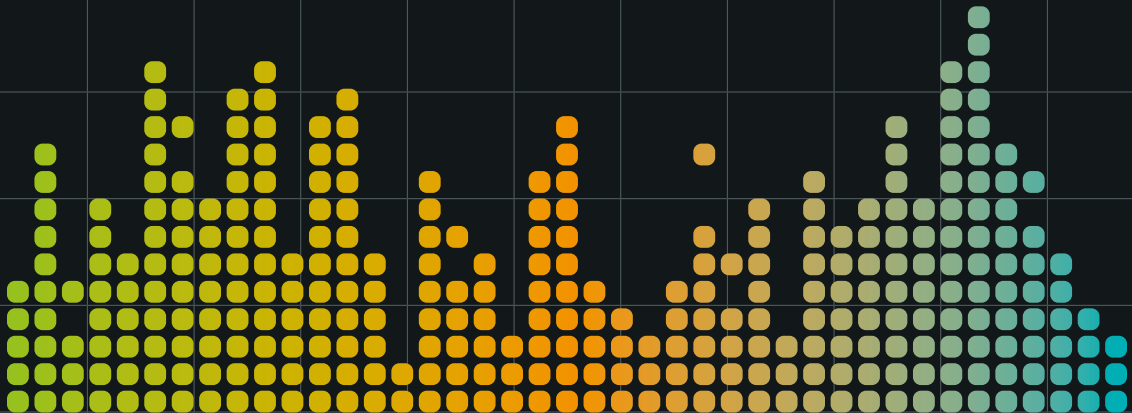
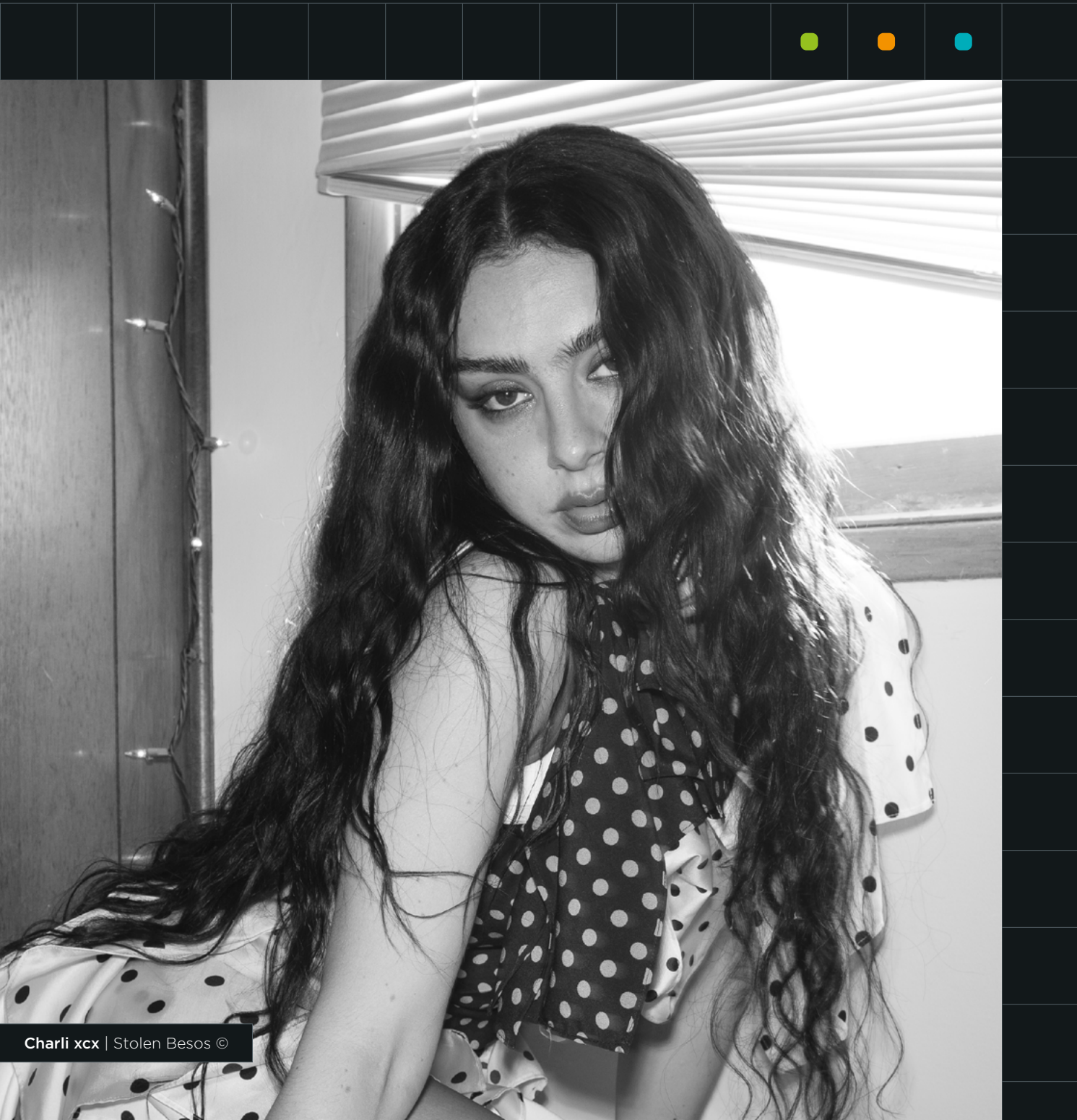




# THIS IS MUSIC 2025





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# Introductions



**Tom Kiehl**  
Chief Executive,  
UK Music

The UK music industry grew by 5% last year and now contributes £8 billion to the economy. Exports increased by the same amount and are worth £4.8 billion. Employment went up by 2%, with 220,000 working in the sector. This is all good news, but let us not get too carried away.

In recent years UK Music has reported that the music industry has enjoyed double-digit annual growth. That growth has now halved indicates a levelling off of the immediate post-pandemic boost that we experienced, as well as other underlying issues set out in this report. This points to the need for urgent action.

In last year's report I warned that now was not a time to be complacent and if problems are not addressed then future growth cannot be guaranteed. This year I make the same call, but louder.

The UK has the greatest artists, songwriters, producers and music companies in the world, with This is Music 2025 remaining committed to shining a light on this with case studies on brownbear and Black Acre Records, and how they are innovating and pushing boundaries.

These musicians and businesses are a crucial part of what we call the artist development cycle, which is described in depth in This is Music 2025. The Government has committed to a £30 million Music Growth Package and it is vital that these much needed funds are channelled to boost this cycle, as well as targeting other key issues.

But while it is brilliant news that the Government now acknowledges music as a high-growth sub-sector, ultimately the Government needs to be judged in terms of the progress it makes in regulating artificial intelligence and unlocking EU touring.

The status quo on these two big issues is currently tilted against music's interests, with This Is Music 2025 revealing new survey data on both AI and EU touring evidencing why we need the balance to swing back in our favour.

This is a pivotal moment for the UK music industry, let's come together to make sure we realise our full potential.



Jamie xx | Alasdair McLellan ©



**Rt Hon Yvette Cooper MP**  
Secretary of State for Foreign,  
Commonwealth and Development  
Affairs

The UK music industry remains one of our greatest international success stories.

Every year, we see more new artists from Britain becoming global stars, and our existing world-famous musicians reaching new heights, all of them adding to the incredible heritage of creativity, talent and genius that has defined UK music throughout our history.

As Foreign Secretary, I am deeply grateful for the role that the UK music industry plays in promoting British culture around the world, opening doors across continents, and acting as one of the most powerful expressions of our soft power in action. We have therefore ensured music is a key part of the Government's new Soft Power Council, which brings together leaders ranging from culture and sport to tourism and education to discuss how the UK projects itself globally.

At a time of continuing economic challenges around the world, the UK music industry also makes an important contribution to the overall strength of our economy, and the figures in this annual report show that the industry is continuing to grow in gross value added, exports and employment.

Yet despite UK music's successes, we are aware that the industry faces real challenges.

The grassroots music sector, which nurtures the talent that goes on to achieve global success, is facing pressures that risk holding back the next generation of artists, while touring barriers make it harder for those artists who have enjoyed success at home to go to the next level and reach an international audience. We are committed to working with our European partners to make it as easy as possible for British artists to perform their music on the continent.

Competition is also intensifying as other nations seek to grow their own cultural exports, and take a greater share of the global market for new music. In this fiercely competitive environment, it is more vital than ever that we support British creativity.

The Government's Music Growth Package – announced this year – will provide up to £10 million annually over three years to support touring, performance, mentoring and export opportunities for emerging talent to help them break through at home and abroad. The funding will support the whole music ecosystem from the grassroots upwards, helping UK music to maintain its global impact.

With the Government's support, the UK music industry can continue growing from strength to strength, delivering economic growth, nurturing new talent, and exemplifying to the world our nation's creativity and global influence. Together, we can ensure that Britain is where our country always belongs – a leader on the global stage.



# The Figures

In 2024, the music industry contributed **£8.0 billion** in gross value added (GVA) to the UK economy, an increase of 5% from **£7.6 billion** in 2023. Export revenues reached **£4.8 billion** in 2024, up 5% from **£4.6 billion** in 2023, and employment stood at **220,000**, up 2% from **216,000** in 2023.

Growth slowed from the double-digit increase the music industry had experienced each year since 2021, as it was recovering from the pandemic, to single digits in 2024. This is not unexpected and is consistent with global market trends. Goldman Sachs, which tracks the global music industry across recorded, publishing, and live sectors, reported 6.2% growth from 2023 to 2024.<sup>1</sup> Similarly, the IFPI reported 4.8% growth for the global recorded music sector.<sup>2</sup>

UK music creator revenues continued to grow in 2024, but at a slower rate than the music industry as a whole. This was due to a softer release schedule by major UK recording artists and fewer major artists in a touring cycle during 2024.

The UK music industry is global. Agents, promoters, record labels, music publishers, and music managers routinely work with both UK and international talent. All this activity contributes to the UK's GVA. Revenues from international music creators are important, and the UK is often a tastemaker market for international artists on their path to global success.

However, the biggest single factor that makes the UK music industry a global success story is its ability to develop new UK artists, songwriters, musicians, and producers who generate revenues

not only at home but around the world, and deliver export revenue back to the UK, which boosts GVA. In this context, the success of homegrown talent, and its continued development is extremely important.

It is taking longer for new artists to break through in a connected global marketplace. This is true not just of UK artists, but artists from other territories, such as the USA, which means that sustained investment and support is required to ensure new talent flourishes. This is explored in the Artist Development Cycle section of this report.

Coinciding with this shift, UK artists and music creators have suffered from additional barriers to major markets such as the EU and USA, which we explore in the Export Barriers section. At home, challenges at grassroots level are increasing, with rising costs for touring artists, recording studios, venues and small record labels within the independent music community; this in turn threatens the foundations on which artist development is built.

Finally, artificial intelligence presents a potential overarching threat to the music industry. We explore the issues from the perspective of music creators.

Despite these challenges, UK creative and executive talent remains strong, and there are successes we can celebrate. Charli xcx is a good example. Her decade-long career culminated in the global breakthrough album Brat in 2024, which also saw her step up to arenas for the first time. This Is Music will explain the context behind these trends, how the industry is innovating, and highlights policy asks to help support this work.

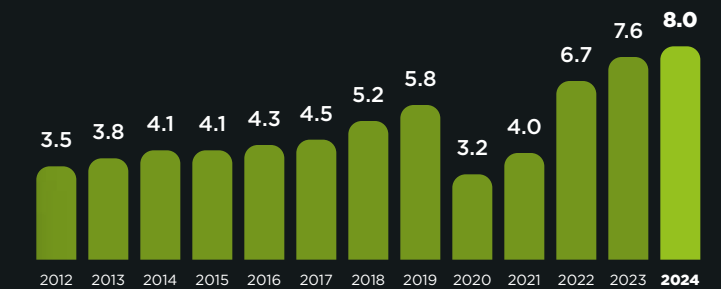
<sup>1</sup>Please see page 48 for a full list of references.

## 2024 Figures

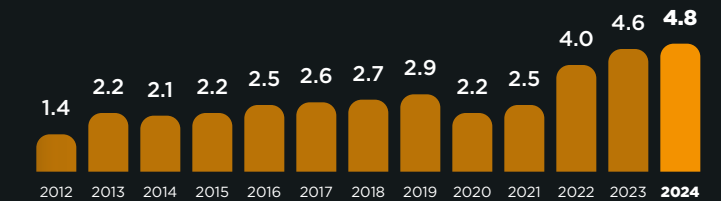


## Historial Trend

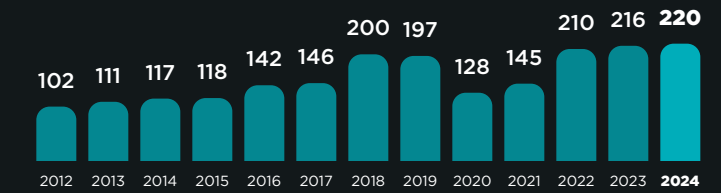
GVA (£ Billions)



Exports (£ Billions)



Employment (FTE 000's)



# The Four Commercial Assets

This Is Music shows how economic value is created around four commercial assets: composition, recording, live performance and brand and image. These four commercial assets involve all sectors of the music industry, and are the foundations on which GVA, exports and employment are built.



## Asset 1: Musical Composition

A musical composition and/or lyrics



## Asset 3: Live Performance

A live musical performance



## Asset 2: Recorded Music

A (master) recording of the music composition



## Asset 4: Brand and Image

An artist themselves (as a brand, reputation or image)

## Musical Composition

Songwriters and composers create the building blocks of songs and compositions on which the music industry is built. Supported by music publishing companies, and Collective Management Organisations (CMOs), composition revenues continued to grow in 2024, albeit at a slower rate. Music publisher revenues were £1.7 billion in 2024, up 5% from £1.6 billion in 2023.<sup>3</sup>

Music publishing revenues include direct licensing from areas such as sync, print, and grand rights (e.g. musicals) while digital rights revenues are either derived directly through agreements with Digital Service Providers (DSPs) or through a society hub (e.g. MCPS & PRS for Music via ICE Services). Areas of business such as broadcast, mechanical, and public performance licensing are administered by either MCPS and/or PRS for Music (dependent upon the rights required by the licensee) before being paid to publishers or direct to songwriter and composer members of each society.

Part of the music publishers' revenue, reported above, was derived from PRS for Music, which paid out a record £1.02 billion in royalties to songwriters, composers, and music publishers, up 8.1% on £943.6 million in 2023, and breaking the billion-pound barrier for the first time in terms of payments to members.<sup>4</sup> MCPS also delivered over £200m to its members in its centenary celebration Year.<sup>5</sup>

Music publishing is quietly successful and offers a solid pillar of revenue to the UK music industry and broader economy. Musical composition is a flexible and expansive copyright which includes not only songs, but film scores, background, production music, and lyrics.

Artificial intelligence poses a threat to the music industry as a whole, but that threat is especially pronounced, even existential, for many forms of musical composition such as production music. We consider the threat of AI later in this report.

**Music publisher revenues were £1.7 billion in 2024, up 5% from £1.6 billion in 2023**

**PRS for Music paid out £1.02 billion in 2024, up 8.1% on £943.6 million in 2023**

<sup>3</sup>Please see page 48 for a full list of references.

## Recorded Music

Recorded music comprises artists, musicians, producers, mixers, engineers, studios, labels, distributors, alongside PPL, which licenses the public performance and broadcast of recordings in the UK and collects for similar uses internationally.

Recorded music revenues reached £1.49 billion in 2024, up 4.8% from £1.43 billion in 2023.<sup>6</sup> This includes physical sales, downloads, streaming, sync income, and public performance income to rights holders.

Streaming revenues grew 5.7% to £1.02 billion in 2024 from £962 million in 2023, and physical revenues from the sales of CD, vinyl, and cassette grew 1.3% to £246.5 million in 2024, from £243.4 million in 2023.<sup>7</sup> PPL paid out £284.6 million to UK recording rightsholders, up 5% from £271.9 million in 2023.<sup>8</sup>

Streaming revenues continue to grow, although as one of the first markets to adopt streaming from around 2008, the UK is one of the more mature streaming markets and other international markets are catching up.

Purchased music remains important, proportionately so for independents, who account for 32.2% of CD sales, 37.6% of vinyl sales, and 38.9% of digital albums, compared to 29.0% for Album Equivalent Sales (including streaming).<sup>9</sup> Independents market share across all formats, including streaming, has increased over the past five years, but independents have consistently performed better on purchased formats, including download sales, compared to streaming.

Some commentators have speculated that streaming algorithms may favour US repertoire, which has the benefit of a huge home market, which helps US repertoire achieve scale relative to smaller English-speaking markets such as the UK. The influence of algorithms is a hotly debated topic, and while the evidence is circumstantial (the algorithms themselves are confidential), concerns exist within the industry, particularly among some independents who lack the resources to compete for the same attention on streaming platforms.

Following a strong year for UK talent in 2023, the share of sales by UK artists based on the top 10,000 albums dipped from 35.7% share in 2023 to 33.6% in 2024.<sup>10</sup> This was due partly to a softer release schedule and developing artists taking longer to reach their full potential. This latter point is explored in more detail in the Artist Development Cycle section of this report.

## Live Performance

The live music sector experienced continued growth in 2024, albeit more slowly than in 2023. That growth was powered by concerts, particularly stadium and arena tours.

Taylor Swift was the standout tour of 2024, but The Swift Effect was only one factor, as tours by Take That, Bruce Springsteen, Foo Fighters, and others all contributed during 2024.

Growth in the festival sector continued, but was more muted. There is also the challenge of balancing pricing tickets competitively against increased costs which is a challenge for everyone in the sector, particularly smaller festivals. Nevertheless, UK festivals continue to lead the world in attracting artists and audiences.

While 2023 saw major tours by Harry Styles, Elton John, and Arctic Monkeys, there were fewer major tours by UK artists during 2024, the biggest being Take That. This due to touring cycles and 2025 has seen not only the Oasis reunion, but also major tours by Coldplay, Dua Lipa, and Catfish and The Bottlemen, the latter stepping up to stadiums for the first time. In most cases, the UK dates are part of an international tour, and this will boost export revenues for music creators in 2025. It will also mean more work for musicians who play with the headliners, support acts, and road crews.

Promoters and venue operators invest heavily at every level in the live industry, including grassroots, and they do this on very thin margins. Challenges remain at the grassroots level especially, where many venues and independent festivals have closed over the past few years.

While the plight of small venues and independent festivals is well documented, the impact is especially severe for grassroots artists who find it increasingly difficult to tour. The biggest problems artists face is that income from touring is not keeping pace with the cost of touring, alongside a downward pressure on consumer spending at this level resulting from an ongoing cost of living crisis. This is explored more fully in the Artist Development Cycle on page 24, and in brownbear's case study on page 32.

<sup>6</sup>Please see page 48 for a full list of references.

**Recorded music revenues reached £1.49 billion in 2024, up 4.8% from £1.43 billion in 2023**

## Brand and Image

Brand and image revenues are smaller than other assets, but can be the cherry on the cake, financially, for creators and businesses. However, these revenues can also be highly variable.

For example, non-traditional recorded income (which includes audio-visual projects, such as film and TV productions, and deals with hardware manufacturers) almost doubled in 2022, declined by 20% in 2023, but rebounded in 2024, growing 17%. The dip in 2023 coincided with the SAG-AFTRA strike, which affected film and TV production in the USA. Similarly, sync licensing, which saw a dip in 2023, rebounded in 2024 with both the recorded and publishing sectors showing double-digit growth.

Music merchandise companies reported a solid year in 2024, with figures roughly tracking the music industry as a whole. Performance between companies varies considerably, and that is largely dependent on who is touring. UK merchandise companies work with both UK and international talent alike, so although there were fewer major tours by UK artists in 2024, demand remained strong.

Merchandise companies continue to innovate across direct-to-consumer, licensed merchandise, and retail. This helps boost revenues for new and established touring artists, those artists who are no longer actively touring, and even the estates of deceased artists. Creative product development, planning, and close collaboration between artists, managers and merchandise companies are the keys to success. Brexit remains a major challenge for many in the music merchandise sector, and this is covered on page 36.



# Exports

Exports continued to grow, but growth has slowed. This trend is consistent with a slowdown in the global music market during 2024.<sup>11</sup> Fewer major tours and a softer release schedule by UK artists in 2024 were contributing factors. There were no UK artists in the top 20 most-streamed artists globally in 2024, compared to three UK artists in 2023, but UK artists such as Dua Lipa, Sam Smith, and Harry Styles were present in the top 100.

However, performers and recording rights holders saw a healthy increase in international broadcast, online, and public performance income collected by PPL.

It is likely that major international tours by Oasis, Dua Lipa, and Coldplay, together with new albums by Ed Sheeran, Wolf Alice, and Central Cee, will boost exports during 2025. UK breakthrough artist Sleep Token have already toured extensively during 2025, including arena shows, and there are also hopes for Olivia Dean, who has already sold out four nights at the O2 and is in the midst of experiencing a significant international breakthrough.

UK music publishers and songwriters earn not only from the international sales of recorded music and public performance income (including from international touring), but also by collaborating with international artists, be they European, American, or South Korean.

British composers also undertake international commissions, and UK-based record producers work with international artists. All this activity contributes to exports.

In an increasingly competitive global market, it is vital that barriers are removed, not only to ensure that UK artists can access international markets, but also that the UK remains attractive for international artists seeking creative collaborations, including songwriting and production.

The proliferation in repertoire from international markets, such as South Korea and Latin America, is dialling up the competition for UK labels especially. While bigger UK labels have the resources to compete internationally, many smaller labels do not.

The UK's small independent labels are key investors in developing new artists. However, as we discuss in the Artist Development Cycle, the time it takes to develop artists is increasing, and so are the risks and barriers, making it even more difficult for small labels to compete internationally.

Schemes such as MEGS (Music Export Growth Scheme), which is government backed, go some way, but more support is needed. Countries such as South Korea, Canada, Australia, and the Nordics are investing heavily in local music creation and exports, including setting up music export offices. The UK should do the same.

<sup>11</sup>Please see page 48 for a full list of references.

# Employment

The UK music industry employed 220,000 people in 2024, up 2% from 216,000 in 2023. Growth in employment lags growth in GVA and exports, and there were differing experiences across the sector. The number of music creators, which includes artists, musicians and performers, composers and songwriters, and music producers and engineers, grew steadily to 157,800, up 2.9% from 153,400 in 2023.

Average earnings amongst musicians who earn 100% of their income from music were £30,000 per annum, but earnings vary, with 43% earning less than £14,000 a year from music, meaning many are left supplementing their income.<sup>12</sup> Employment across the rest of the music industry was more variable.

The music retail sector experienced a second year of decline as restructuring continued.

There was a small decline in the recorded music sector as some labels restructured their UK operations, and employment in the live sector was flat.

Smaller businesses report significant challenges, citing additional costs such as increased National Insurance contributions and other operational costs, including export costs. AIM has reported a decline in its members' participation in its apprenticeship scheme owing to increased costs.

Music publishing registered a noticeable increase in employment relative to other sectors as music publishers grew their headcount again, following some reorganisations in 2022 after the pandemic.

Slower employment growth in the industry is also a consequence of increased productivity across the sector. Companies are using existing staff roles more efficiently, and freelancers and the self-employed are increasingly moving towards portfolio careers, particularly music creators who comprise the largest employment group within the music industry.

**Employment was 220,000 in 2024, up 2% from 216,000 in 2023**

<sup>12</sup>Please see page 48 for a full list of references.



RAYE - BRIT Awards 2024 | John Marshall ©

# The Artist Development Cycle

## Introduction

Artist development is not an exact science with no one fixed method or metric to achieve and measure success. Since 2020, there has been a shift in the market, with fewer debut albums by UK artists making it into the year-end top 1000 album charts, as artists are taking longer to achieve breakthrough success. Some of the factors influencing this trend are global, and there is evidence of similar trends in other markets, most notably the USA.

The Artist Development Cycle is easily misunderstood. This section describes the challenges, the context, how the industry is innovating, and where government can help.

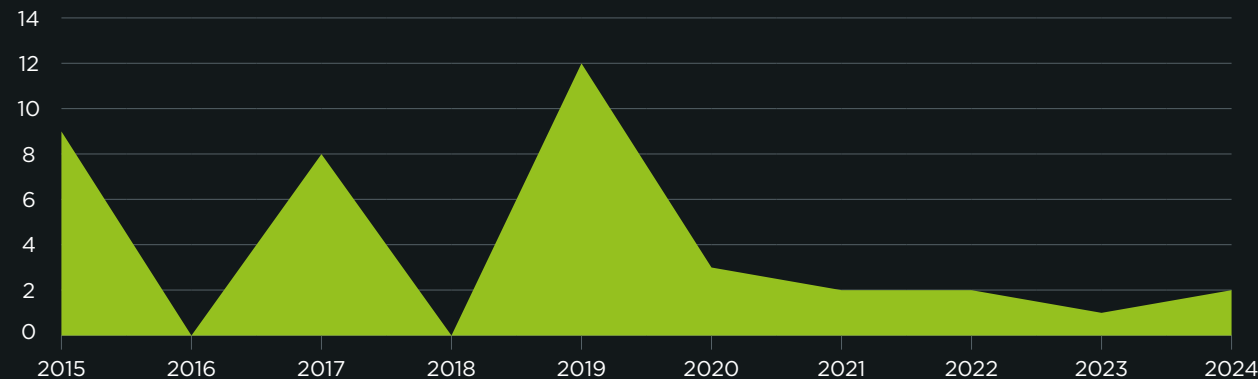
## The Challenges

What constitutes “breaking” is open to interpretation. In broad terms, it means artists who achieve a breakthrough success in their careers. Albums remain a focal point as substantial bodies of work and markers in an artist’s career.

The chart below shows the number of debut albums by UK artists in the UK top 100 year-end album chart since 2015. This is a crude metric, but it illustrates a clear pattern.

Between 2015 and 2019, thirty debut albums by UK artists featured in the year-end charts. These included albums by Dua Lipa, Stormzy, Lewis Capaldi, Sam Fender, and Mabel. Between 2020 and 2024, ten debut albums by UK artists featured, including albums by Wet Leg, Central Cee (mixtape), Celeste, RAYE, and The Last Dinner Party.

Number of Debut Albums by UK Artists in the UK Top 100 Year End Album Chart



Source: Official Charts Company

Debut UK albums include mixtapes, and albums that the UK can claim, be that an international artist signed/developed in the UK, and UK artists signed internationally, but with some level of base or team in the UK. Solo artists from an established band count towards debuts.

## Context: The Growth of Catalogue

The number of new albums by all artists (new and established, UK and international) has also declined significantly since 2015, as the chart below illustrates.

In the five years from 2020 to 2024, there were 194 new albums in the year-end chart, compared to 412 new albums between 2015 and 2019, a decline of more than half.

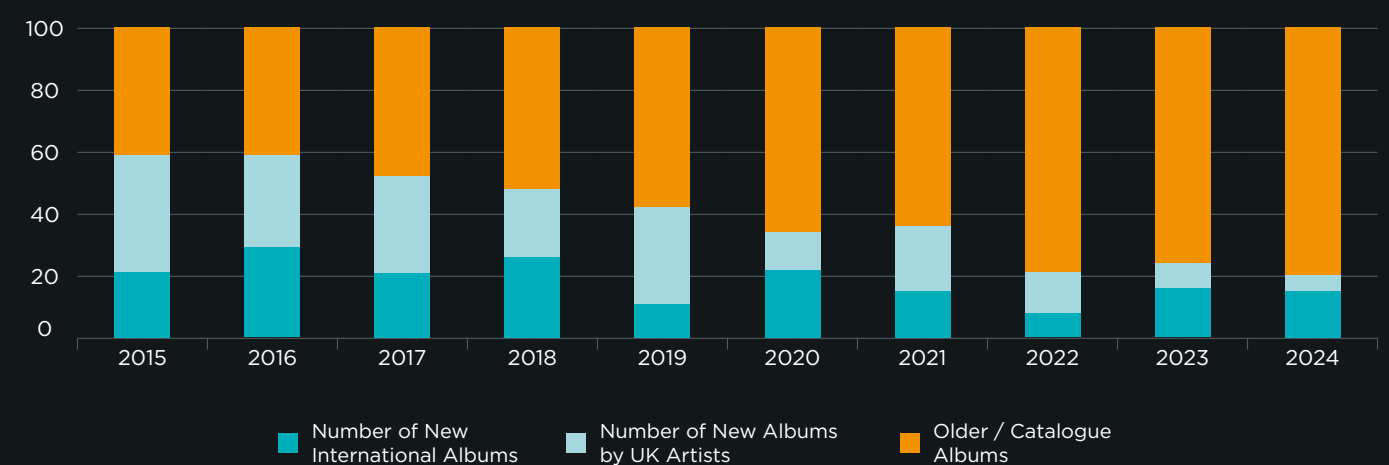
This is because older albums, including catalogue and greatest hits, are occupying a greater share of the market than ever before, including the album charts.

This change is a product of streaming, which now accounts for more than 68% of recorded music revenues in the UK and globally.

Streaming rewards consumption over purchase.<sup>13</sup> While purchase generates value in one upfront transaction, the value in consumption is spread over time, which could explain why so many catalogue titles are prominent in the charts and why it now takes longer for new artists to build profile. The move from physical record stores to digital and streaming has also boosted catalogue.

While it has never been easier to make and release music, it has never been more difficult for new artists to be heard and for music creators to build careers. Artists are not only competing against other new releases, but also against the greatest music ever recorded from anywhere in the world.

Number of New Albums in the UK Top 100 Year End Album Chart



Please see page 48 for a full list of references.



## Context: Global Trends

The USA has also seen a slowdown in the time it takes for new artists to achieve a breakthrough in their careers. According to music industry directory ROSTR, the time taken from first release to nomination for the Best New Artist category at the 2025 Grammys has increased from around 2 years in 2001 to 7.8 years in 2025. This year's nominations include Sabrina Carpenter (10.8 years), RAYE (8.3 years), Chappell Roan (7.2 years), and Doechii (6.3 years).<sup>14</sup>

It now takes longer for artists to build audiences. Music is released globally on digital platforms from day one, which means artists and their teams must decide how to focus their time and resources to grow domestic and international audiences simultaneously against a backdrop of increased competition and overwhelming consumer choice.

The UK is a small, traditionally fast-paced market, and this previously gave the UK an advantage. Artists could go from grassroots to national prominence quickly, and this momentum often ignited international success. Oasis went from debut single in 1994 to playing two nights at Knebworth in 1996, with two multi-platinum albums along the way.

Streaming revenues have doubled since 2018. This has changed the dynamics of the global music market. A longer-term, international approach is now required from day one. This shift coincided with more headwinds for UK artists and music creators.

Firstly, the impact of the pandemic made it very difficult for emerging artists to promote themselves during 2020 and 2021.

Secondly, leaving the EU in 2020 meant UK artists and music creators lost frictionless access to the EU market, placing them at a considerable disadvantage to both European and American talent, who have free access to much larger markets (EU and USA) on their doorstep.

Thirdly, increased costs and bureaucracy for UK artists and music creators entering the USA (see page 36) further restricts access to the biggest international market of them all.

This creates greater barriers to UK artists scaling their careers internationally, not only in terms of live performance, but also streaming, which still requires artists to be physically active in international markets to promote themselves and build traction.

**7.8 years**  
average length of time between first release and Grammy nomination for **Best New Artist** in 2025  
Source: ROSTR

<sup>14</sup>Please see page 48 for a full list of references.

## Foundations: The Grassroots Ecosystem

Coinciding with a changing and increasingly competitive global landscape and barriers to key international markets, UK music creators must also navigate increasing challenges within the grassroots ecosystem at home.

Music creators invest heavily in their own careers. Live performance can be a crucial source of income for artists especially both in terms of fees and public performance royalties for songwriters, but many touring artists are increasingly unable to make performing live financially viable, and this has various knock-on impacts. The situation is especially acute for self-releasing and self-funded artists, as brownbear discusses in his case study.

The challenge at grassroots level is something UK Music highlighted in Victoria Canal's case study in our 2024 report, where she contrasted the prohibitive cost of touring the UK with touring similar venues in Europe and the USA.

One means of cutting costs is to cut the number of musicians on stage. Artists, especially at grassroots level, often face the difficult dilemma of playing a cut-down set with a reduced band or playing to a backing track, or making a loss on the show.

This has a knock-on impact. Music creators can occupy several roles at once, so a backing musician in one band could be using the income they earn from that work to invest in their own artist project. If an artist makes cuts to their band, a musician not only loses paid work, but also investment funds

for other projects. With grassroots under pressure to this extent, the foundations on which artist development in the UK is based are in danger of crumbling.

A House of Commons Culture, Media, and Sport Committee Review was announced in 2025 to investigate these issues as part of a fan-led review of live music.<sup>15</sup> This follows a House of Commons inquiry into grassroots music venues published in 2024,<sup>16</sup> and the Music Fan Voice report which was backed by the Metro Mayors and published in 2025.<sup>17</sup>

These two published reports emphasise the importance of a healthy grassroots ecosystem in building sustainable careers and businesses. The Music Fan Voice report highlighted the central role that the artist-fan relationship plays in driving live music consumption. The House of Commons report noted that "artists are collectively the sector's biggest employers," supporting supply chain costs and personnel, including session musicians and road crew, in addition to business partners such as managers and agents.

The cost of touring is a major issue for artists, but challenges in the grassroots ecosystem impact all music creators including musicians, songwriters, and producers, which is discussed on page 27. Recording studios are also an integral part of the grassroots ecosystem, and they face serve challenges, which is discussed on page 29.

<sup>15</sup>Please see page 48 for a full list of references.





## Music Creators and The Artist Development Process

Featured artists often work as non-featured performers, songwriters, and producers separately from their own artist projects, and many music creators work primarily in these individual roles. Music creators occupy varied roles, meaning they experience the same challenges in different ways.

Songwriters are often integral to the artist development process, either co-writing with artists or working to a brief. Their contributions are usually speculative, rather than receiving a daily or hourly rate for their time. Payment is dependent on royalties, and in the streaming age, there have been challenges for some songwriters, and these challenges can be more acute amongst those songwriters who are not performing artists or have alternative means of income.

Meanwhile, musicians and non-featured performers have faced cuts to touring work, not only at grassroots level, as described above, but also at mid-level, which is also feeling the pressure, resulting in cuts to the number of musicians, road crew, and support acts. Recording budgets have also stagnated, negatively impacting musicians, non-featured performers, and producers.

To alleviate some of these concerns, a government backed set of principles announced in July 2025 by the BPI and AIM, with agreements from all three major labels, introduces a set of measures to benefit specific groups of UK music creators. This includes schemes to reinvigorate legacy artist careers and earnings and record labels paying per diems and expenses to songwriters and composers they invite to label-hosted writing sessions. As well as the principles, an increase in session fees to musicians was agreed separately.

Record producers often play a key role, particularly when working with unsigned artists, which ordinarily can be an extremely risky venture for individual producers. However, producers no longer have the financial flexibility to take the risk to find, develop, and invest in new talent. This is because such work is speculative and subsidised by paid work elsewhere, but rising costs and restricted budgets, restrict producer's ability to undertake speculative work.

The potential closure of recording studios, an important source of income, training, and development for everyone involved in the making of recorded music is a major threat to the talent pipeline. According to the Music Producers Guild (MPG), 50% of the UK's remaining studios face a threat of closure.<sup>18</sup>

Collectively, music creators invest in one another and in themselves. Featured artists invest in their work, but so do producers, songwriters, and session musicians, which can also be an investment in their own careers. The challenges are mounting, but with smart investment and support the UK will continue to be an incubator for world beating talent.

## How the Music Industry is Innovating

The UK music industry has been adapting to these challenges over the past decade. Record labels are offering more flexible deals, which can be structured around singles and EPs before committing to an album. Artists also have more options to release music and build audiences, and music managers help shape this strategy. 2025 has seen a number of significant emerging British artists across multiple genres come to prominence.

Central Cee is a notable success story, releasing a series of singles, EPs, and two mixtapes over a number of years before his debut album in January 2025, which reached number 1 in four markets and top 10 in the USA. Key to his success was building profile in the UK and across multiple international markets simultaneously. He also took a flexible approach to his business, first releasing under his own label, then striking a distribution deal with Warner's ADA division, before signing with Columbia Records (part of Sony Music) in 2023.

Olivia Dean is a BRIT School graduate who began self-releasing her own music in 2018, before signing with EMI (Universal Music) in 2019. Like many artists, she had to navigate the pandemic without the benefit of an established fanbase before releasing her debut album Messy in 2023, which peaked at number 4 in the UK. Olivia's second album, The Art of Loving, released in September 2025, reached number one in six markets, including the UK, and reached the top 10 in the USA.<sup>19</sup>

Rock band Sleep Token began self-releasing music in 2016, before signing to independent label BasicK, then Spinefarm (Universal Music), and most recently RCA (Sony Music), culminating in the release of their third album Even in Arcadia which reached number one in nine markets, including the UK and USA. Key to their success was a flexible approach to business, while focusing on building a strong connection with their fanbase.

There are many other examples including artists such as beabadoobee, Myles Smith, Lola Young, Griff, Sampha, and Ezra Collective, who are building their careers in more innovative ways. RAYE developed her career as a world-class songwriter (for Beyonce, Charli xcx, and others) and as a featured vocalist, alongside building her career as an artist.

Music managers build strategies that take an artist from initial self-release, to breakthrough success. This involves building a team, which may evolve over time, finding investment and striking partnerships.

The MMF estimates that for every £1 invested in music management, it returns £8 to the music industry.<sup>20</sup>

While there is tangible evidence to demonstrate the underlying strength in UK talent, there is still a lot of work to do. As this report demonstrates, the level of competition and challenges have increased, and government has an important role to play to help ensure the UK music industry remains a success story.

## Recording Studios

Recording studios are a key foundation in the artist development process and the grassroots ecosystem, but have felt the pinch in what has been and continues to be a challenging market. A combination of stagnant fees and rising costs has created an incredibly tough environment for recording studios, whose world-class expertise often makes the difference in achieving global success.

Recording studio clients include labels, publishers, managers, and artists. UK recording studios also attract international clients, particularly from the USA. Some bigger studios also count film and TV companies among their clients, both in the UK and internationally, with a particular emphasis on the USA and Hollywood.

UK Music has reported significant challenges in the studio sector over the past few years, and these challenges remain. The key issues are:

1. **Fees.** One studio commented, "We need the ability to increase our rates in line with rising costs, as we're at risk of moving below our breakeven point in the very near future."
2. **Business rates.** Every studio, large and small, that engaged with us cited business rates as a major issue and one of the biggest contributing factors to increased costs.
3. **Threats to international revenues.** For example, the SAG-AFTRA strike in Hollywood negatively impacted some studio in 2023, and this continued into 2024.

Brexit has also impacted studios, with fewer EU clients and fewer US clients using the UK as a base for EU tours, and therefore not booking UK recording studios during the touring season.



Please see page 48 for a full list of references.



# Case Study: **brownbear**

Being a creative is a blessing in life and to be able to do this for a living is a privilege that none of us take lightly. The passion for what we do is often what keeps us driven in the face of adversity.

We work tirelessly to better ourselves at every turn, even when there is no financial reward. We are our biggest supporters, and our own biggest critics. Our love of what we do aside, this is a business, and for artists, particularly self-releasing, independent artists, what is the current state of affairs in the UK?

As an independent self-releasing artist, I am my own manager, agent, label, publisher all whilst being the sole creative. I am juggling many different parts of my career, but as a songwriter, nothing is more important than the song. Without that, we have nothing.

Writing takes time and space, this part of the process is often unpaid so I rely on funding to be able to support myself through this time.

Making the record is also costly, of course gigs and merchandise can help subsidise releases but without the investment of a label, public or charitable funding becomes the source that many artists now rely on to be able to sustain their creative practice.

I have been very fortunate to have been supported by Help Musicians, PRS Foundation and Creative Scotland over the past few years. Music funding bodies and charities are currently lifelines for many creatives in the UK right now.

Then we come to touring, previously this along with merchandise could help to sustain your career. With the rising cost of living, and ticket sales being down across the board, artists and venues alike are feeling the strain.

This has meant that even touring in the UK, has become increasingly less sustainable for brownbear. Adding in visas for Europe, America or beyond would just feel completely unachievable at this point without considerable investment or support from funding organisations. For venues and promoters, it is increasingly more difficult to take risks on new acts.

I don't want to have this all sound negative; there are many positives. One being that in Scotland, several promoters and venues have started to focus on audience growth for the venue rather than acts. There has been a real growth in venue membership clubs, it is wonderful for both fans and artists.

On a personal level, we have spent time developing unique one-off shows in locations we know will sell, to help us grow both as artists, and as an act, and in turn increase our chances of being able to sustainably tour again.

Self-releasing artists are a growing force in the UK music economy. We are resilient and we have learned how to do things differently. A lot can be learned from this often-unheard sector. We excel at direct to fan content, and in building relationships with fans. We are often far outperforming any expectations or financial restrictions.

One huge gap is that being an artist that does it all themselves, means you often miss the contacts that may be able to get involved and take the project to even greater heights.

There is not one person who gets into this business for any other reason than a love of music. I believe that if we all could talk a little more and have an increased focus towards the writers and creators that make the content that is the basis of all sectors of the business, then we could be in a much healthier place.

Music has an impact in all of our lives, in ways that we can't measure in volume or profit. We should never lose sight of that. We have to put people first, not metrics. There are vast numbers of people across UK not engaging in music, we must do more to bridge that gap.

Grassroots venues are essential not just in the career trajectory of music artists and creators but also music fans. It is likely the place you see your first show and perhaps become a lifelong fan of a band that you got to support from day one. They are the lifeblood of the industry, and we are in danger of losing them. Investing early, and in communities not just individuals, is what is going to give us the chance of returning the UK's tradition of generating trail-blazing musical icons.



# Export Barriers

## EU Touring

For the third consecutive year, UK Music has surveyed music creators on their experiences of touring the EU following Brexit. The picture is still bad and is getting worse.

Of those surveyed, 32% were affected by the UK leaving the EU, up 4% from 28% in 2023. Of those affected, 95% experienced a decrease in earnings, up 8% from 87% in 2023. Most of the biggest factors affecting artists have shown no improvement, or even worsened, in the three years this survey has been running.

Consistent with previous years, the impact of Brexit is most acute amongst lower earners and those music creators building their career for the first time. Music creators at this level are micro-businesses, and with minimal resources available to them, the impact of Brexit often makes touring the EU untenable.

Additionally, *PRS for Music* data shows a stark decline in small and medium-sized live performances reported by its members since Brexit. Between 2019, the last year in which UK musicians had freedom of movement rights pre-Covid, and 2023 there was a 27% decline in live performance claims for EU festivals and events with a capacity of under 5,000.<sup>21</sup>

Reduced touring opportunities not only directly affect artists and crew unable to tour, but also songwriters who see reduced royalties where their works are no longer being performed by UK artists at concerts and festivals in EU countries.

The same issues that apply to touring also apply to other forms of work undertaken by music creators in the EU. Consistent with previous years, many respondents who are UK-based songwriters, composers, and producers noted a decline in production and composition work from EU-based clients. UK-based Musicians and DJs are also not being booked for cruise ship, hotel, and resort work.

Year	2022	2023	2024	+ / -
Total survey responses	1,461	1,117	1,306	
Answered question	1,371	1,044	1,194	
Earnings affected by leaving EU	30%	28%	32%	4%

Respondents affected by leaving the EU	405	297	377	
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Of those affected leaving the EU:				
Earnings have increased	18%	13%	5%	-8%
Earnings have decreased	82%	87%	95%	8%

Adverse income-related issues:				
Fewer invites to perform	65%	71%	78%	7%
Invites are not feasible (e.g. too expensive)	57%	57%	68%	11%
Touring the EU no longer an option	43%	41%	44%	3%
Reduction in performing right royalties	28%	31%	34%	3%
Unable or uneconomic to sell merch	33%	31%	33%	2%
Inability to hire crew	15%	18%	10%	-7%
Reached 90 day limit	16%	18%	10%	-8%

Adverse cost-related issues:				
Visas or work permits	59%	60%	64%	4%
Transport costs	55%	59%	58%	-1%
Administration costs	56%	59%	58%	-1%
Shipping and logistics	54%	53%	57%	4%
Carnets	32%	29%	37%	8%
Production costs	34%	40%	36%	-4%



Please see page 48 for a full list of references.

## Leaving the EU: The Broader Impact

The impact of leaving the EU has affected all sectors of the music industry, not just touring artists. This includes music merchandise companies, direct-to-fan e-commerce, independent record labels, music management companies, tour production companies, recording studios, and more. These companies, many of which are small and medium sized enterprises (SMEs), have some resources available to them to help mitigate the impact of Brexit, but the challenges are significant, and in aggregate, a drain on the economic performance of the UK music industry.

### USA Visas

The level of cost and bureaucracy UK artists must bear when entering the USA has increased substantially over the past decade. This took a further turn for the worse from 1 April 2024 when visa costs increased 250%.

To further compound matters, processing times have increased from weeks to months, meaning artists are often forced to pay additional fees for a fast-track service, which is often needed, given the flexibility often required, particularly at an early stage in an artist's career.

For those artists who self-release or are signed to smaller labels, these costs make touring the USA untenable. It places British artists at a considerable disadvantage to their American counterparts, who do not face such charges when entering the UK. This is a major issue for UK artists and music creators, given a shared language and cultural references, barriers to the US market severely restricts UK talent.

A number of trends emerge:

- 1. Increased costs**  
The costs can be direct, such as duties, or indirect, such as increased employment costs or additional costs incurred with external advisors to navigate the impact of Brexit.
- 2. Increased red tape**  
Multiple companies complain of increased red tape and the drain on staff time. Employment growth in the sector has slowed for various reasons, adding even more pressure on the music industry workforce.
- 3. Mental health**  
Allied to the point above, several music industry employers commented on the impact Brexit has had on their employees' mental health. This is especially acute where physical product and cross-border transactions make up a significant proportion of a company's business.
- 4. Solutions take value away from the UK**  
Where SMEs have found solutions, this often means taking economic value away from the UK, such as opening a European subsidiary, using European-based suppliers, road crews, musicians, and so on.

The combined impact of EU restrictions and US visa costs and bureaucracy is placing the UK at a severe disadvantage, compared to EU and US artists who have unfettered access to large markets. The Government can help remove these barriers.



Animesh Raval - Breakthrough Engineer of the Year, MPG Awards 2025 | David Bird ©

# Case Study: Black Acre Records

Black Acre Records was founded in Bristol in 2007 amidst the explosion of the new electronic genre of dubstep in the city. With a focus on discovering new artists and not being constrained by genres,

Black Acre Artist Management (founded in 2017) naturally evolved from years of developing talent. The management wing is now the centre of our music services, and we pride ourselves on being a genuinely artist-centered music company with fair and futuristic development deals to reflect the industry's perpetually changing times.

Both companies are run equally by Ian Merchant (founder of the label) and Eva Greene (who joined in 2012 and co-founded the management company). In 2018 we won 'Best Small Label' at the AIM Independent Music Awards, and following this, Eva was elected to the Board of Directors of AIM (sitting for years from 2019-2022). This provided us with an enforced network of leading independent music companies and an insight into the shared needs of the independent sector.

We have an office in Bristol at St Anne's House, a creative and community hub in an up-and-coming area, run by a local non-profit Arts Organisation in an ex-Council Building. Our company structure is based on two directors and two local members of staff who are employed by the Artist Management Company.

In 2025 we are proud to have released the second album by Bristol-based band SCALER, an act known for their explosive live shows and with a strong local following.

With PR/Radio campaigns in the UK, Europe & USA, they head out on a headline UK/EU tour in November. The Bristol album launch (in partnership with Rough Trade) sold out in three minutes, and we also arranged a London launch at legendary record shop Phonica Records.

In 2021 we ran the 'Black Acre Pathways' programme funded by Youth Music, in which we gave two people from Bristol & Somerset a paid opportunity to run their own music project with our support and network. This also enabled us to partner with and pay local music businesses to help run the project, and we also took Inclusive Recruitment Training from Rising Talent, a Bristol-based creative agency led by young, underrepresented creatives. This training was invaluable and led us to reach a large pool of underrepresented groups. Black Acre Pathways is a programme we would like to run again when we have the capacity and funding to do so.

Black Acre Records' income is spread across digital streaming & downloads, the sale of vinyl in record shops & D2C websites, and sync licensing. A growing part of our D2C revenue is from the platform Bandcamp, which has a loyal user base of fans who want to support independent music by buying directly from artists/labels, and often pay over the asking price.

We reinvest most of our revenue in the production & marketing of new releases. As a business, this means that we are constantly contributing to the music/creative industry not only by providing resources for artists releasing on our label but by paying for the costs of production, press, radio promotion, photography, video/visuals, marketing & advertising. The majority of this spend is within the UK.

A current challenge of our label business is that profit margins are being squeezed by increased production & shipping costs of vinyl, higher wages & freelancer rates, post-Brexit customs charges when shipping to the EU, and new US tariffs on shipping merchandise (not applicable to vinyl).

In an uncertain economy, we are still wanting to find new opportunities to grow the business, while finding it more difficult to plan for the future. We will always endeavor to be an independent company whose ethos is to support & nurture new talent.



Eva Greene | Black Acre Records ©

# Artificial Intelligence

Artificial Intelligence is a major issue for the music industry, particularly where rights are being infringed by AI companies undertaking unlicensed learning. This was heightened late in 2024 following the government proposing changes to copyright that make it harder for creators and businesses within the music industry to enforce their rights.

We asked respondents to our 2025 music creators' survey questions about Artificial Intelligence (AI). This revealed that some music creators, especially record producers and engineers, already use AI for tasks such as audio restoration, creating demos, and mastering.

However, AI can be used to generate music based on what the model was trained on, with little to no human input, which raises concerns that AI-generated music is a threat to human creation and artist development. For example, AI-generated music populates streaming playlists, misleads consumers, and reduces the share of royalties available for human creators.

AI has attracted significant media coverage, but knowledge and understanding of what constitutes AI and how it will be applied in practice are still evolving and will continue to do so for some time.

Record producers have more experience with using AI in assistive tasks than other creator roles and have a more positive view of AI used as part of the creative process, where the human creator remains in control.

When it comes to matters such as consent, payment, labelling AI content, and ensuring a creator's voice and image are protected, music creators are overwhelmingly united in agreeing that such protections should be in place, with over 90% of respondents indicating their support. This sends a clear message to the technology sector and government about what is required.

There is a high level of concern across the music creator community as a whole, but songwriters and composers have a heightened level of concern across all the questions raised, and with good reason.

Many UK-based songwriters and composers work in media and production music, which can be a career in itself or part of a portfolio career. AI poses a particular threat to this area of work, which is likely to devastate the careers of those most affected and have a broader destabilising impact on music creators as a whole.

Copyright protections are fundamental to economics of the music industry and ability for creators and rights holders to authorise use and participate in value creation. Introducing a copyright exception would undermine any licensing process.

## Do you currently use AI tools to help you with music creation?

	Artist	Performer	Writer	Producer	Total
Don't know	3%	3%	4%	2%	3%
No, and I have no intention of using AI in future	55%	62%	50%	31%	52%
No, but I am open to using AI tools in future	27%	26%	25%	28%	26%
Yes, I use/ have used AI tools to help create music	16%	9%	20%	39%	18%

## How do you feel about AI where it is used by human creators to support the creative process and where the human creator remains fully in control of the creative process?

	Artist	Performer	Writer	Producer	Total
Don't Know	2%	4%	3%	3%	3%
Positive	31%	25%	33%	48%	32%
Negative	49%	55%	47%	31%	48%
Neutral	17%	16%	17%	19%	17%

## AI tools are helpful to my career as a music creator.

	Artist	Performer	Writer	Producer	Total
Agree	25%	15%	27%	46%	25%
Disagree	47%	56%	46%	30%	47%
Neither agree nor disagree	28%	29%	27%	25%	28%

**AI poses a threat to my career as a music creator.**

	Artist	Performer	Writer	Producer	Total
Agree	64%	66%	71%	61%	66%
Disagree	15%	13%	11%	15%	13%
Neither agree nor disagree	21%	21%	18%	23%	21%

**AI companies should pay if they use musical compositions and recordings to train AI.**

	Artist	Performer	Writer	Producer	Total
Agree	92%	94%	95%	92%	93%
Disagree	3%	1%	1%	1%	1%
Neither agree nor disagree	5%	6%	4%	7%	5%

**How do you feel about AI where it is used to create new compositions, lyrics, and recordings with little to no human input?**

	Artist	Performer	Writer	Producer	Total
Don't Know	2%	2%	2%	2%	2%
Positive	9%	6%	8%	15%	9%
Negative	79%	82%	81%	66%	79%
Neutral	11%	9%	8%	17%	10%

**I believe AI generated music should be labelled so fans know what they are listening to.**

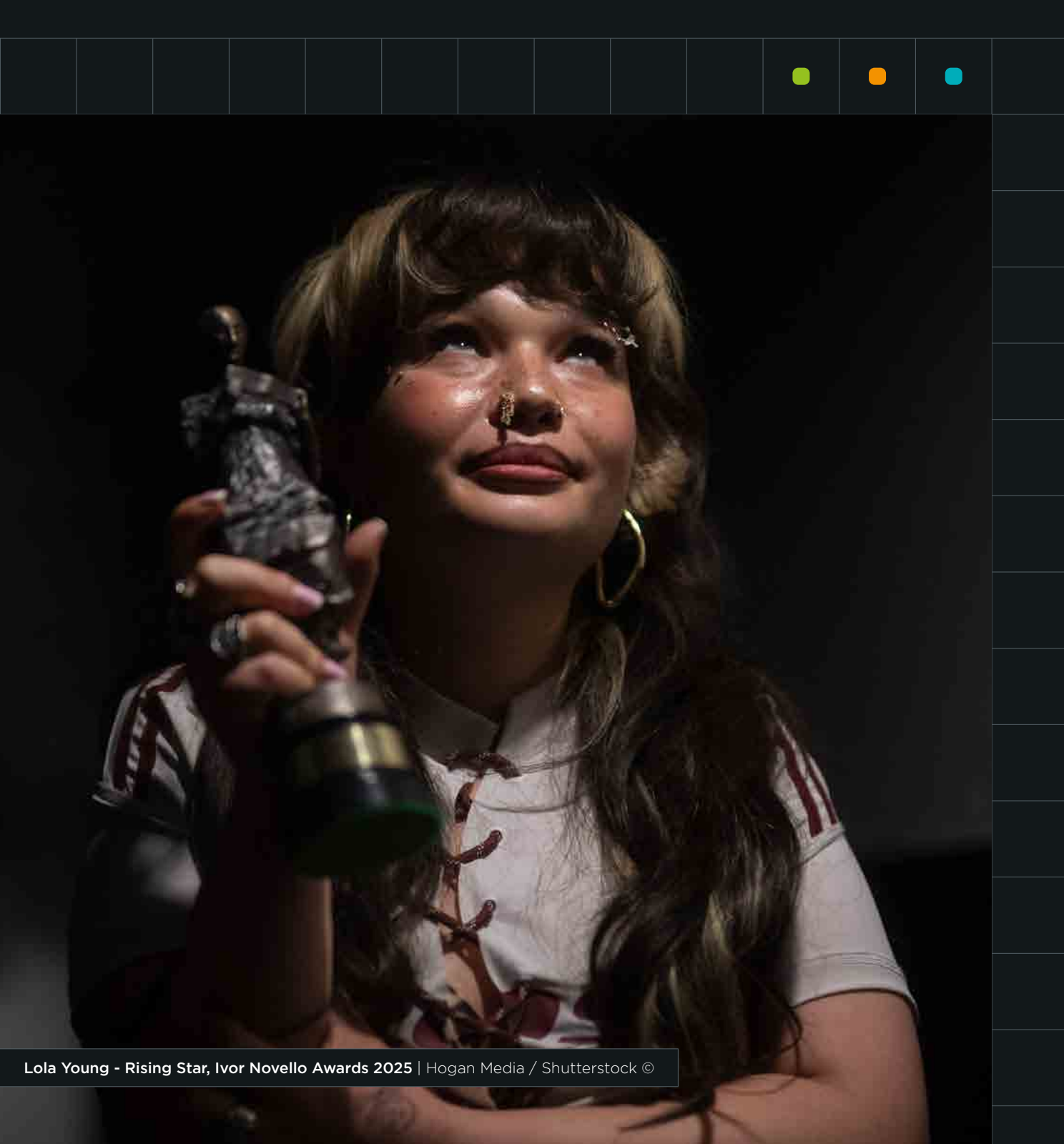
	Artist	Performer	Writer	Producer	Total
Agree	91%	94%	93%	90%	92%
Disagree	3%	1%	1%	2%	2%
Neither agree nor disagree	6%	5%	6%	8%	6%

**Consent should be sought before musical compositions and recordings are used to train AI.**

	Artist	Performer	Writer	Producer	Total
Agree	89%	90%	94%	90%	91%
Disagree	3%	2%	1%	3%	2%
Neither agree nor disagree	8%	8%	4%	8%	7%

**I want my voice and image rights to be protected.**

	Artist	Performer	Writer	Producer	Total
Agree	94%	95%	96%	92%	95%
Disagree	2%	1%	0%	1%	1%
Neither agree nor disagree	5%	4%	4%	8%	5%



# This is Music Now, But What Next?

This report demonstrates that while there is growth across the music industry, there are challenges.

The next year presents a number of opportunities that must not be missed to put music at the heart of the policy agenda. From implementing the Creative Industries Sector Plan, Curriculum Review and National Centre for Arts and Music Education. There is also the rolling out the Music Growth Package, BBC Charter Renewal, and business rate reviews. We will also continue to push for fiscal incentives to encourage investment through a tax relief and legislating for price caps on ticket resales.

However, above all, there are two overarching factors that threaten the continued success of our world-leading sector: Unregulated AI and barriers to global exports.

Here are some specific steps the government can take to remove these obstacles to continued growth:

## Artificial Intelligence

- **Reject any copyright exception that undermines the basic principle for how music is used and compensated for.**
- **Introduce legal obligations on AI developers to disclose copyright works used in training.**
- **Establish a legal requirement for clear labelling of AI-generated music.**
- **Ensure that companies accessing UK markets comply with UK laws on AI and copyright.**
- **Explore personality rights to provide individuals with legal protection over the use of their image, likeness, voice, and personal identity.**

## Global Exports

- **Secure an agreement with the EU to remove barriers to cultural exchange such as visa and work permit requirements.**
- **Negotiate a reciprocal agreement with the USA on visa fees for performing artists and crews and ensure the interests of UK music industry are protected in any trade deals and tariff negotiations.**
- **Remove UK-specific barriers to global exports by cutting costs and red tape around ATA Carnet (often referred to as a passport for goods) and Musical Instrument Certificates.**
- **Establish a Taskforce to develop an international strategy for music in the face of increased global competition.**



# Methodology

This Is Music examines the value the UK music industry contributes to the economy. We calculate the results in terms of Gross Value Added (GVA), exports and employment. These are the same metrics used by the Department for Culture, Media and Sport (DCMS). GVA measures the contribution to the economy of each individual industry and is used in the estimation of Gross Domestic Product (GDP).

UK Music produces a bespoke GVA estimate because existing Standard Industrial Classification (SIC) codes used by government to estimate GVA for industry sectors in the economy do not adequately capture the music industry. If UK Music did not do this work, no GVA figure would exist for the music industry.

GVA is not the same as revenue. In simple terms, GVA measures the surplus value created by an industry after costs. Therefore, GVA is lower than revenue, as the industry's costs are removed when estimating GVA.

We take great care not to double count the different sectors of the industry when estimating GVA and to take into account different cost structures across the industry. For instance, a music creator, music manager and record label all earn from recorded music but have different cost structures. However, when discussing an individual sector of the industry, we refer to revenue figures and not GVA to ensure we include all participants in that value chain.

Additionally, we only count revenues for the core music industry, not broader revenues impacted by music, and we only count direct revenues, not indirect revenues through the value chain. For instance, for live music, UK Music counts box office and onsite spending (such as food and drink) at the venue, but we do not count spend by the concertgoer outside the venue in the report. In contrast, the music tourism figures produced separately by UK Music include the broader spending of music tourists when attending concerts or festivals in the UK, and indirect revenues through the value chain.

For exports, UK Music uses the internationally recognised Organisation for Economic Cooperation and Development (OECD) definition: "Exports of goods and services consist of sales, barter, or gifts or grants, of goods and services from residents to non-residents."

For the most part, exports included in this report involve money that moves across international borders. That is non-resident consumers and/or businesses making purchases outside the UK which, through various channels, transfer back across international borders to UK-based businesses.

In some cases, such as music tourism, export purchases occur inside the UK, where non-residents of the UK spend money on tickets for music concerts or festivals in the UK. In doing so, they are contributing to exports, as they are non-residents spending on the services of residents.

UK Music has used largely the same methodology since the inception of this report in 2013, with a smaller update occurring for the 2019 report, but in 2023 UK Music revised that methodology. The basic structure remains largely intact, but we have sought additional data points, applied learnings acquired over the years, and updated how we model certain sectors of the industry to reflect the realities of the music industry in 2024.

We continue to work with economic consultants Oxford Economics, who advised us on the methodology review and who also provided significant aspects of our analysis. We also work with all our members and industry partners to ensure we are properly reflecting all the various facets of the music industry in this report. A complete methodology is available on the UK Music website.



Download Festival | Andrew Whitton ©

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We are pleased to continue working with the Intellectual Property Office (IPO), the Department for Digital, Culture, Media and Sport (DCMS) and the Office for National Statistics (ONS) on this project.

Oxford Economics are retained as our economic consultants, and provided significant aspects of the underlying analysis. A full methodological statement can be found on the UK Music website.

This report was written and produced by **Andy Edwards**, Director of Research & Analysis at UK Music.

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This report on the music industry has been created on behalf of UK Music and its members to highlight the contribution of the music industry to the UK economy.

UK Music is the collective voice of the UK's world-leading music industry. We represent all sectors of our industry – bringing them together to collaborate, campaign, and champion music. The members of UK Music are: AIM, BPI, FAC, The Ivors Academy, MMF, MPA, MPG, MU, PPL, *PRS for Music*. UK Music also has an informal association with LIVE (Live music Industry Venues & Entertainment).

