

# Music Marketing Messages

March 2020

**Music marketing message: 1**

**The quality and originality of UK music make it a major influence on world tastes and trends.**

* UK music is a worldwide brand and creative force, recognised for its anti-establishment vibrancy and character. UK musicians have played a pivotal part in the development of new musical forms, from house music – where they turned a US art form into a global phenomenon – to Punk, Two Tone, the New Romantics, Glam Rock, Dubstep and Grime.
* From The Beatles, Rolling Stones, Pink Floyd, David Bowie, Led Zeppelin, Queen and Sex Pistols, to Radiohead, Coldplay, Adele, Muse, Ed Sheeran, Stormzy, Calvin Harris and Dua Lipa, the UK continues to break new ground in popular music.
* The UK music scene nurtures and showcases world-class musicians in the classical and jazz sectors, including Katherine Jenkins, Courtney Pine, Jamie Cullum and Gwilym Simcock.
* Outside London, major regional centres have produced world-class popular music talent including:
* The North West of England brought the world The Beatles, Oasis, The Bee Gees, The Stone Roses, The Smiths and The Chemical Brothers.
* Scotland has produced Calvin Harris, Simple Minds, Annie Lennox, Franz Ferdinand, Biffy Clyro, Primal Scream and Texas.
* Northern Ireland is where Van Morrison, Snow Patrol and The Undertones originated.
* Wales produced Tom Jones, The Stereophonics, Manic Street Preachers, Catfish and the Bottlemen and Super Furry Animals.

**Music marketing message: 2**

**The UK has a strong track record in developing and promoting the international careers of its talented composers and performers. It consistently delivers acts that break across international territories and sell in markets right across the world.**

* The total export revenue of the music industry was £2.7 billion in 2018. (1)
* A total of 11.2 million music tourists from abroad and around the UK enjoyed events in the UK in 2018 - up 3 per cent from 10.9 million in 2017. The music tourism area of the UK Live Music industry generated £4.5 billion in spend in 2018, rising 13 per cent from £4 billion in 2017. (2)
* The industry has seen growth across the board in every sector from music creators, retail and recorded, to publishing, representatives and live. (3)
* The inter-dependency between sectors is what gives the UK music industry its diversity and economic success, fostering a unique eco-system. (4)
* The UK Music Creators sector contributed £1.1 billion to the total export revenue in 2018. (5)
* UK Music’s research found that producers contribute a significant amount to exports, as their jobs see them working often with international artists. (5)
* The UK Recorded sector contributed £478 million and UK Music Publishing sector £618 million to the total export revenue of £2.7 billion. (3)
* The UK Live sector also continues to be a huge success, making a GVA contribution of £1.1 billion in 2018. (3)
* The UK Music Representatives sector contributed £148 million to the music industry’s GVA in 2018, while Representatives’ sector exports remained strong at £387 million in 2018. (6)
* Of the four artists to have achieved multi-platinum status in the US since 2014, three are British: Adele, Ed Sheeran and Sam Smith.
* As of June 2019, Adele's album 21 is the highest selling studio album of the last 20 years, with 30,140,000 pure album sales and 45,255,000 Equivalent Album Sales. It sold over 1 million units in Canada, Australia, the UK, France and Germany (the last album to do so was Dire Straits‘ Brothers In Arms in 1986). (7)
* As of June 2019, Adele's album 25 is the fastest selling album of all-time in the US and the UK, among other countries. It is also the fastest selling album worldwide. (7)
* At 33 weeks, Ed Sheeran’s *Shape of You* is the longest running Top 10 hit ever in the US. (8)
* At 11,602,000 EAS (Equivalent Album Sales) from streaming, Ed Sheeran’s album *÷* (*Divide)*is the most successful streaming album of all-time, and at 7,870,000 EAS from streaming, his album *x (Multiply)*is the third most successful streaming album of all-time. (8)
* In 2019 British artists dominated the album charts once again, occupying six out of the top 10 year-end places, including both the No.1 and No.2 spots with Lewis and Ed Sheeran respectively, and 14 out of the top 20. (9)
* British acts including Ed Sheeran, Dua Lipa and Sam Smith helped exports of UK music soar in 2018 to £2.7 billion. (1)
* The success of British artists – ranging from [Queen/the Bohemian Rhapsody soundtrack](http://www.musicweek.com/talent/read/bohemian-rhapsody-wins-big-at-the-oscars-2019/075414) to [George Ezra](http://www.musicweek.com/talent/read/george-ezra-is-music-week-s-artist-of-the-year-2018/074784), [Dua Lipa](http://www.musicweek.com/talent/read/she-s-a-wonderful-artist-dua-lipa-leads-uk-charge-at-grammys/075275), [Paloma Faith](http://www.musicweek.com/interviews/read/songs-of-faith-paloma-faith-on-her-return-to-the-spotlight/069904), [The 1975](http://www.musicweek.com/talent/read/they-re-the-the-only-thing-i-care-about-the-1975-s-matthew-healy-explains-his-bond-with-the-fans/073989),[Stormzy](http://www.musicweek.com/labels/read/stormzy-is-going-to-be-the-big-one-atlantic-gm-katie-white-on-the-reshaped-label-s-ambitions/075595), [Dave](http://www.musicweek.com/publishing/read/he-s-a-very-important-artist-warner-chappell-s-mike-smith-on-the-rise-of-dave/075674) and [Calvin Harris](http://www.musicweek.com/media/read/the-1975-calvin-harris-win-big-at-slick-brits-show/075389) – was also cited as another key factor in the growth. (10)
* Lewis Capaldi was undoubtedly the British breakout star of 2019. He topped both the Official Singles and Official Album year-end charts as his debut album *Divinely Uninspired To A Hellish Extent*, released in May, was BRIT Certified 2x Platinum, selling over 640,000 albums across all formats and album equivalents, including well over 250,000 copies on CD and vinyl combined, according to Official Charts Company data. It featured the hit single *Someone You Loved*, which racked up over 2.3 million chart-eligible sales. Lewis was also a huge success in the USA, hitting number one on the Billboard Hot 100 in October 2019. (11)
* Overall, music royalties collected by PRS in 2018 generated £746 million. This represents a year-on-year increase of 4.4 per cent, or £31.6 million, and after costs and other income, results in net distributable revenue of £648.4 million.  (12)
* International royalty income continues to be the largest revenue stream for *PRS for Music*members, underlining the enduring popularity of British music. Global chart successes and major live world tours from PRS members including Ed Sheeran, Roger Waters, U2 and The Rolling Stones, contributed to this growth. (12)
* Royalty income from digital services climbed 17 per cent (£21.2 million) to £145.7 million. (12)
* British artists Dua Lipa and Ella Mai were among the winners at the 2019 Grammy Awards, with Dua Lipa winning Best New Artist and Ella Mai picking up Best R&B Song for *Boo’d Up*. (13)
* UK winners at the 2019 Oscars included DJ, songwriter and record producer Mark Ronson for the original song accolade *Shallow* from *A Star Is Born*, Sound engineer Paul Massey took the sound mixing prize for *Bohemian Rhapsody*, and John Warhurst and Nina Hartstone won the sound editing Oscar, also for the Queen film. (14)
* The BPI-run Music Export Growth Scheme (MEGS) provides funding each year to help UK music companies develop artists or projects internationally. Since its launch in 2013 almost £3.5 million has been distributed to 227 mainly indie-based music projects. The scheme has seen a return of over £11 for every £1 invested, generating some £35 million for the UK music economy. (15)
* UK rapper Dave won the Mercury Prize in 2019 for his debut album, Psychodrama,hailed as "[the boldest and best British rap album in a generation](https://www.theguardian.com/music/2019/mar/08/dave-psychodrama-review-best-british-rap-album)". Released in March 2019, Psychodrama entered the UK charts at number one and had sold 129,354, copies by September. (16)

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**Music marketing message: 3**

**The UK music scene is profitable, diverse and eclectic, with a hunger for musical innovation of all kinds. UK consumers have a thirst for consuming and accessing music in fresh and multiple ways.**

* The UK is the world’s most competitive and diverse digital music market, with more than 70 legal services catering for all different kinds of music fan. (1)
* There are now 190,935 people working in the music industry in a variety of roles and disciplines. (2)
* The industry has seen growth across the board in every sector from music creators, retail and recorded, to publishing, representatives and live. (3)
* The inter-dependency between sectors is what gives the UK music industry its diversity and economic success, fostering a unique eco-system. (4)
* The UK Music Creators sector includes musicians, singers, composers, songwriters and lyricists, and for the first time, producers and engineers. Overall, Music Creators contributed £2.5 billion in GVA to the UK economy in 2018, which makes up almost half the industry’s total £5.2 billion contribution, showing how vitally important creators are to the music business. (5)
* A total of 139,352 people were employed in the Music Creators’ sector in 2018, and employment growth continues to be strong as more creators switch from part-time to full-time work. (5)
* The UK Recorded Music sector includes record labels, music distributors, recorded rights holders, physical manufacturers and recording studios. The sector contributed £568 million in GVA to the UK economy (a rise of 5% on 2017 figures) and £478 million in exports (a rise of 8 per cent). (6)
* The UK Music Representatives’ sector includes music managers, music trade bodies, collective management organisations (CMOs), plus lawyers and accountants who represent music organisations or music creators. Representatives contributed £148 million to the music industry’s GVA in 2018, while exports remained strong at £387 million. (7)
* The UK Music publishers and publishing rights holders operate on behalf of songwriters and composers, collecting revenue when their work is used commercially. In 2018 the Music Publishing sector contributed £459 million in GVA to the UK economy (compared with £438 million in 2017), and £618 million in exports (compared with £570 million in 2017). (8)
* The UK Music Publishing sector supports around 1,363 jobs. (8)
* UK Label revenues alone, as reported by the BPI, were up by 3 per cent for 2018, with the rate of increase accelerating in the first half of 2019. This represents the third year of consecutive growth in label revenues, which have risen by over a fifth (22 per cent) since 2015. (6)
* UK Label Income was boosted in particular by the continuing increase in subscriptions to streaming services, such as Spotify, Apple Music, Amazon and Deezer, which rose by well over a third (+34.9 per cent) in 2018 and which has seen a dramatic 220 per cent surge in the past three years.  Subscriptions by themselves accounted for 54.0 per cent of UK record label income in 2018.(9)
* Vinyl sales were up 1.5 per cent in 2018 on the previous year, according to the BPI, in part thanks to the ongoing popularity of schemes like Record Store Day and National Album Day. This has in turn helped the UK maintain a network of small independent shops who hold their own against the online giants. (10)
* Vinyl LP sales in 2019 rose for a twelfth consecutive year, with Liam Gallagher’s *Why Me? Why Not*the most in-demand title, selling over 29,000 copies. The top 10 included new album releases by Billie Eilish and Lewis Capaldialongside catalogue classics such as Joy Division’s *Unknown Pleasures*and Queen’s *Greatest Hits*. (11)
* Vinyl LPs now account for one in every eight albums bought (in the UK), with 4.3million purchased in 2019, an increase of 4.1 per cent on the previous year and a rise of over 2,000 per cent on the format’s low point in 2007. (11)
* Music instrument sales contribute a substantial amount to the £402 million total GVA produced by the music retail sector. Buying instruments is a major outlay for music creators. (10)
* The success of streaming services continues to grow. The BPI report there were 90 billion streams in 2018 in the UK alone, up 33 per cent from 2017. (10)
* Official figures released by the BPI, based on Official Charts Company data, show that 2019 marked a fifth consecutive year of growth in the consumption of recorded music in the UK. The equivalent of 154 million albums were either streamed, purchased on physical formats or downloaded – up by 7.5 per cent in volume on the total recorded in 2018. This is the highest amount since 2006, when the figure stood at 161.4 million albums. (11)
* The continued growth in streaming, which rose by 26 per cent on the year, underpinned this rise in consumption. Streaming now accounts for three quarters (74.4 per cent) of Album Equivalent Sales (AES), the metric used by the industry to collectively measure music streaming and purchasing. December 2019 saw the highest weekly total of streams – 2.7 billion – ever recorded, and the 2019 total of 114 billion plays on audio streaming services marks the first time the 100 billion landmark has been surpassed in a single year. (11)
* The most-streamed track of 2019 – Lewis Capaldi’s *Someone You Loved* – was played over 228 million times on audio streaming services such as Spotify, Apple Music and Deezer. Other artists making the year-end top 10 included **Lil** Nas X, Ed Sheeran, Stormzyand Billie Eilish, while singer-songwriter Tones and I enjoyed an 11-week run at the top of the Official Singles Chart with her global smash *Dance Monkey –*the longest run by a female singer in Official Charts history. The most popular 17 tracks were all played over 100 million times each. (11)
* Lewis Capaldi was undoubtedly the British breakout star of 2019. He topped both the Official Singles and Official Album year-end charts as his debut album *Divinely Uninspired To A Hellish Extent*, released in May, was BRIT Certified 2x Platinum, selling over 640,000 albums across all formats and album equivalents, including well over 250,000 copies on CD and vinyl combined, according to Official Charts Company data. It featured the hit single *Someone You Loved*, which racked up over 2.3 million chart-eligible sales. Lewis was also a huge success in the USA, hitting number one on the Billboard Hot 100 in October. (11)
* Whereas soundtrack albums such as *The Greatest Showman*, *A Star Is Born*, and *Bohemian Rhapsody* dominated the best-sellers list in 2018, the story of 2019 was one of particular success for artists. All three soundtracks retained their place in the upper reaches of the year-end chart, but among the new releases it was new artists who shone as well as established acts: alongside Lewis Capaldi’s debut, the top 10 Official Albums Chart for the year included new albums by Ed Sheeran (*No. 6 Collaborations Project*), Billie Eilish (whose debut *When We All Fall Asleep, Where Do We Go?* was both a critical and commercial smash), Ariana Grande (*Thank U Next*) and BRITs British Breakthrough recipient Tom Walker (*What A Time To Be Alive*). (11)
* There were also top selling new solo releases by Rod Stewart (*You’re In My Heart*, which claimed the Official Charts UK Christmas No.1 Album), Stormzy (*Heavy Is The Head*, the much-anticipated follow-up to his number one debut *Gang Signs and Prayer*), Harry Styles (his second full-length LP *Fine Line*), Dave (the Mercury Prize-winning *Psychodrama*), Robbie Williams(*The Christmas Present*), and Mark Ronson (*Late Night Feelings*), to name a few, while albums from Coldplay (*Everyday Life*) and Elbow(*Giants Of All Sizes*) also made their mark, as did the self-titled debut LP from BRIT School alumnus Freya Ridings. (11)
* The success of British artists – ranging from [Queen/the Bohemian Rhapsody soundtrack](http://www.musicweek.com/talent/read/bohemian-rhapsody-wins-big-at-the-oscars-2019/075414) to [George Ezra](http://www.musicweek.com/talent/read/george-ezra-is-music-week-s-artist-of-the-year-2018/074784), [Dua Lipa](http://www.musicweek.com/talent/read/she-s-a-wonderful-artist-dua-lipa-leads-uk-charge-at-grammys/075275), [Paloma Faith](http://www.musicweek.com/interviews/read/songs-of-faith-paloma-faith-on-her-return-to-the-spotlight/069904), [The 1975](http://www.musicweek.com/talent/read/they-re-the-the-only-thing-i-care-about-the-1975-s-matthew-healy-explains-his-bond-with-the-fans/073989),[Stormzy](http://www.musicweek.com/labels/read/stormzy-is-going-to-be-the-big-one-atlantic-gm-katie-white-on-the-reshaped-label-s-ambitions/075595), [Dave](http://www.musicweek.com/publishing/read/he-s-a-very-important-artist-warner-chappell-s-mike-smith-on-the-rise-of-dave/075674) and [Calvin Harris](http://www.musicweek.com/media/read/the-1975-calvin-harris-win-big-at-slick-brits-show/075389) – was also cited as another key factor in the growth. (12)
* Commenting on the overall results (for 2018),[Geoff Taylor](http://www.musicweek.com/talent/read/we-re-profoundly-concerned-bpi-survey-reveals-fall-in-state-school-music-education/075549), Chief Executive BPI & BRIT Awards, said: *“The recorded music industry in the UK is showing consistent growth, driven by investment in new talent, innovative global marketing, and offering music fans outstanding choice, convenience and value”.* (12)

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**Music marketing message: 4**

**Leading creative talents in all fields of the music business are drawn to the UK, attracted by its vibrant creative reputation, cultural diversity and rich musical tradition.**

* The UK is the world’s third-biggest music market after the US and Japan. (1)
* UK music’s huge export value and footprint must be supported and protected in the wake of Brexit. (3)
* Brexit could have an impact on the UK’s touring artists’ ability to move freely across Europe without extra costs and bureaucracy. (4)
* The UK has a well-respected legal system, ensuring high levels of IP protection for artists, publishers and record companies.
* UK-based composers, performers, agents, managers, publishers, distributors, promoters and retailers enjoy an international reputation for professionalism, creativity and expertise.
* The UK is a must-stop venue for international artists on tour, adding to the quality and depth of live music available week-in, week-out in every region of the country.
* The UK Live Music sector includes festival organisers, promoters and agents, production services, and ticketing agents, grassroots music venues, concert venues and arenas (the proportion of their activities which involve live music.). In 2018 the UK’s live music sector’s contribution to the economy grew to a record high of £1.1 billion, which is a 10 per cent overall rise on 2017. (6)
* Festivals have become an important part of people’s leisure time. According to research from Ticketmaster 45 per cent of festivalgoers attend a festival for atmosphere, while 42 per cent go for the line-up. (6)
* Festivals also have a key role in developing artists’ fanbases. 54 per cent of festival-goers seek out gigs for an artist they discover at a festival, according to Ticketmaster, showing how the live sector can feed back in to the rest of the industry. (6)
* Three of the top 13 arenas in the world – The SSE Hydro in Glasgow, the Manchester Arena and the 02 Arena – are in the UK, according to Pollstar. (6)
* The UK has a reputation as the music festival nation of the world. (7)
* A total of 30,529 people were employed in the live music sector in 2018, a rise of 7 per cent on 2017 when the total stood at 28,659. (6)
* Live music in the UK continues to be a great success story. Every year the sector shows growth. Last year 29.8 million fans attended live music events in the UK, a rise of 2 per cent from 29.1 million in 2017. (9)
* Total concert attendance in 2018 remained level at 24.9 million, but again the biggest growth was festivals, where the total audience in 2018 soared by 23 per cent to 4.9 million – up from 4 million in 2017. (9)
* The Music Tourism area of the UK Live Music industry generated £4.5 billion in spend in 2018, rising 13 per cent from £4 billion in 2017. A total of 11.2 million music tourists enjoyed events in the UK in 2018 – up 3 per cent from 10.9 million in 2017. (9)
* Overseas visitors (to live music in the UK) surged by 10 per cent from 810,000 in 2017 to 888,000 in 2018, while domestic (UK) visitors accounted for 10.3 million of the total figure – up 2 per cent from 10 million in 2017. (9)
* There was a 12 per cent rise from £2.5 billion in 2017 to £2.8 billion in 2018 in direct spending from music tourists (expenditure from concert and festival attendees). Indirect spending (the additional cost in the supply chain such as security) rose by 13 per cent from £1.5 billion in 2017 to £1.7 billion in 2018. (9)
* A total of 45,530 full-time jobs were sustained by music tourism in 2018 – up by 1 per cent from 44,896 in 2017. (9)
* The average spend by overseas music tourists was £851 in 2018 (up by13 per cent on the £750 in 2017). The figure was more than four times higher than the £196 average spend by domestic (UK) music tourists in 2018 (up by 5 per cent on the £186 in 2017). (9)
* Scotland saw the strongest growth in numbers of music tourists, rising from 800,000 tourists in 2017 to 1.1 million in 2018, a jump of 38 per cent. (10)
* London attracted the largest number of music tourists with 2.8 million coming to the capital, lured partly by the range of festivals in parks such as Wireless and Lovebox. (10)
* The North East saw overseas tourists increase by 118 per cent. The Great Exhibition of the North ran for two months in the region adding to the rise. (10)
* London saw the greatest amount of spending by music tourists who spent £1.2 billion in 2018 (followed by the South East, with £566 million). (11)
* UK regions that saw large increases in tourist spend in 2018 included Yorkshire and the Humber (a 21 per cent rise from £321 million in 2017 to £388 million in 2018), Scotland, and the North East. (11)
* London saw an increase of 23 per cent in the number of jobs, rising from 7,518 in 2017 to 9,252 in 2018. This was especially prevalent in the festival sector which saw employment rise by 74 per cent to 2,889. (12)
* London has seen a boom in the number of festivals and park shows taking place, with new events like All Points East and Kaleidoscope, helping to increase the number. (12)
* UK schools and colleges offer high levels of musical education, embracing all genres of music from classical to rock.

***Sources***

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**Music marketing message: 5**

**The UK has a productive tradition of collaboration between the music industry and other creative industries, generating a wide range of commercial and creative opportunities.**

* UK creative education has a strong multidisciplinary feel, reflecting the wide-ranging and fast-developing demands of the media and entertainment industries. Talented young directors like Jonathan Glazer have started out filming music videos for the pop industry, and many graphic designers and contemporary artists, like Peter Saville and Peter Blake, have first become known through their work for the music business.
* The UK's advertising sector is a major commissioner, consumer and populariser of contemporary music in a variety of genres. Many UK-produced TV commercials play to an international audience.
* The UK's TV and film industries offer similar opportunities for synergy and partnership, providing another route to market for music artists seeking broad exposure.
* UK music companies have invested heavily in forging new business relationships with a wide range of new partners. These partnerships, with some of the most iconic and forward-thinking brands of the day, have ensured that music is legally accessible in more ways and places than ever before.
* Ever innovative, the UK music industry is constantly evolving and is a pioneer in technological developments, enthusiastically embracing the digital age. Thanks to the internet and the proliferation of new digital services, UK music is being discovered, accessed and enjoyed by a new wave of consumers in markets across the world.
* The UK is known throughout the world for the presentation of professional performance. UK music excels in a wide range of areas, including theatre, stand-up comedy, live literature, musicals, opera, classical music, dance and ballet, hip-hop, street performances, carnival and circus.

**Music marketing message: 6**

**The UK media is strongly supportive of the music industry and provide a range of rich environments for performers and audiences.**

* The UK is respected worldwide for the quality, diversity and sophistication of its media landscape.
* The BBC is a crucial ally of the music industry, helping to break new talent, especially via BBC Introducing, BBC Radio 1 and BBC 6 Music. BBC Radio 3 offers a high-quality service for classical music enthusiasts and promotes young talent through its New Generation Artists programme.
* The UK's commercial TV and radio sectors provide strong national and local competition for the BBC, enhancing choice for music-lovers in all genres.
* High-quality music sections form a regular part of many UK national newspapers, eg The Guardian and The Sun. The UK has a wide range of specialist music magazines, such as *NME*, *Q* and *MOJO*.