UK Acoustics: Sound Economics 2025

The Impact of Acoustics on the UK Economy

Dr John Lincoln, Harlin Ltd

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Institute of Acoustics

Noise Network+
Engineering a Quieter Future

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Your Feedback

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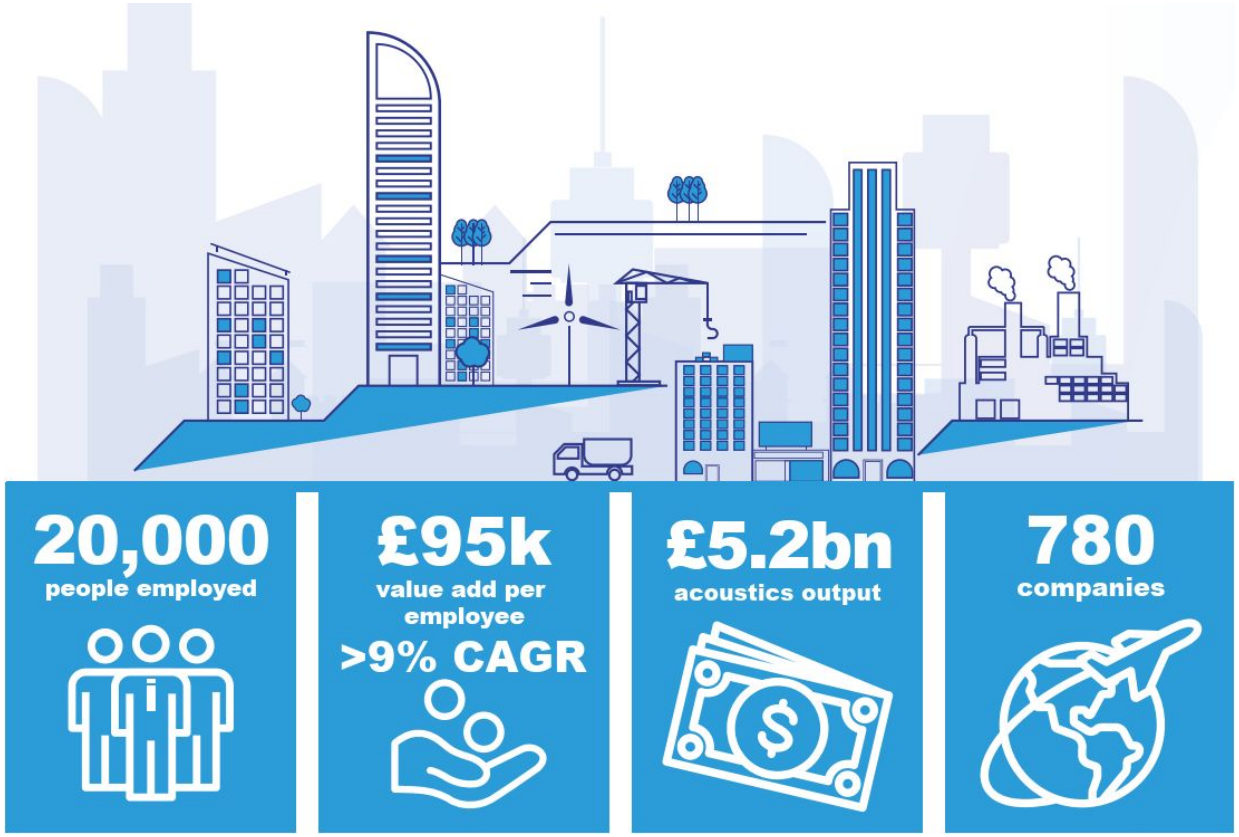
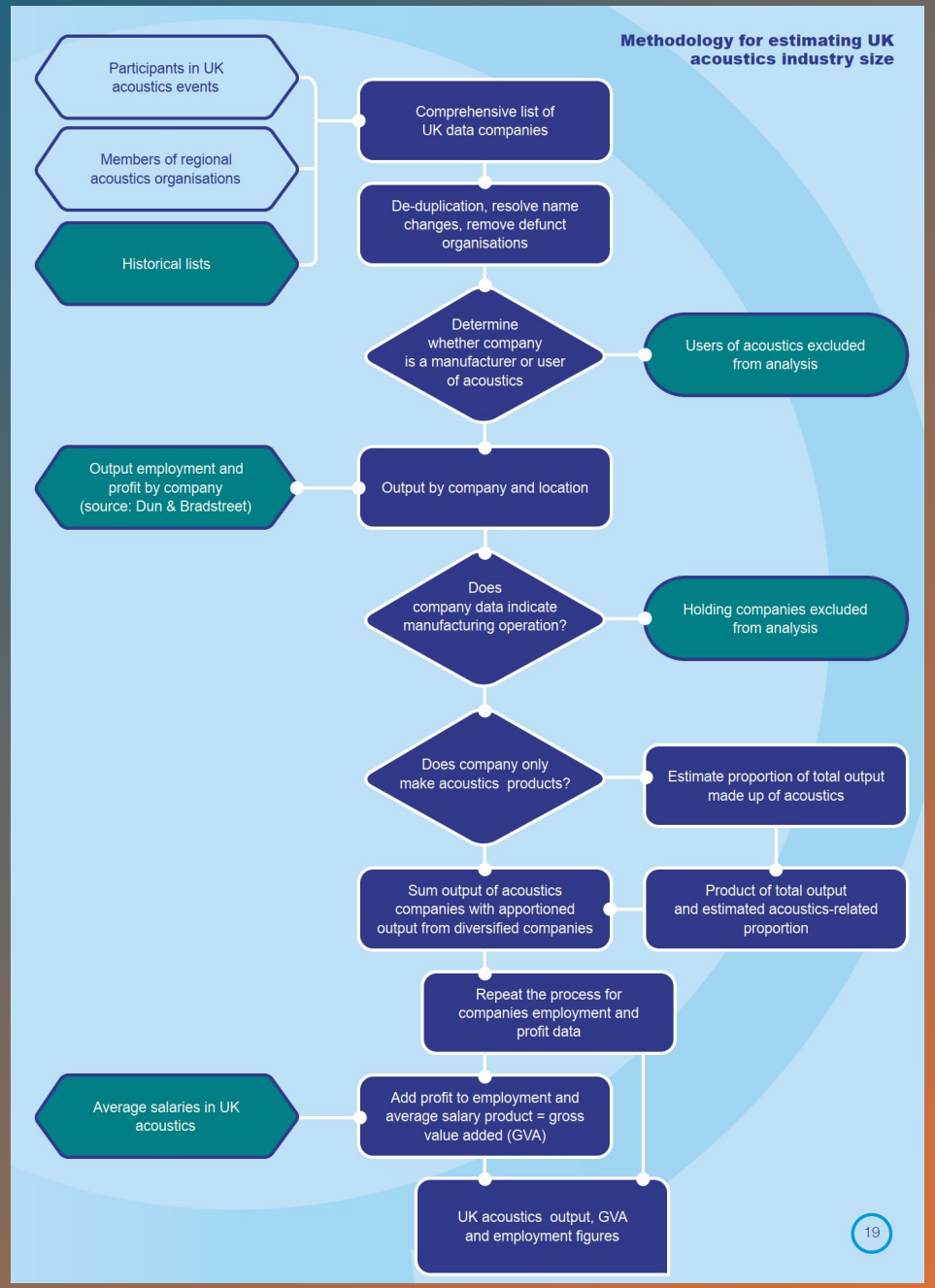
UK Acoustics: 2025

- £5.2bn total annual revenues
- £1.9bn gross value added to economy (GVA)
  - Profits + wages/benefits
- £95,000 GVA per acoustics employee
  - Highly productive
- 20,000 employees in 780 companies
- Companies only



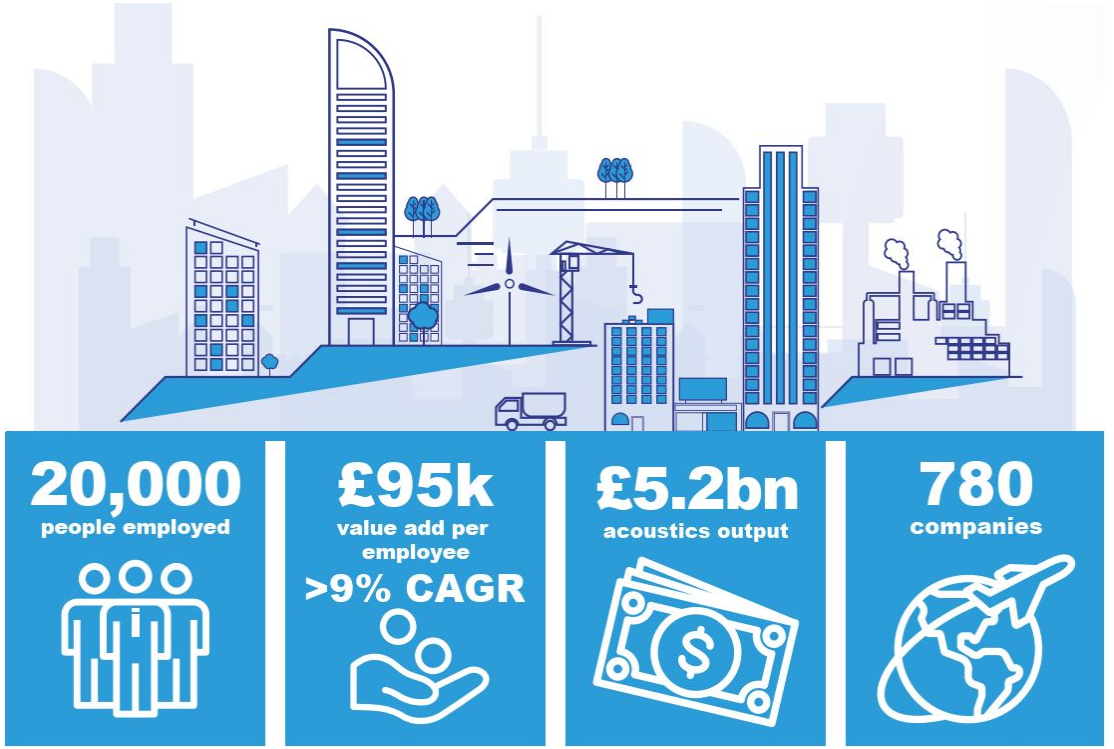


Methodology

- Used across enabling tech Uk & internationally
- ID companies adding value with acoustics
  - Fraction of activity that is UK
  - Fraction of activity that is acoustics
  - UK locations
- Apply to revenue, profit, employment add benefits paid
  - From Dun and Bradstreet and annual reports
- Includes services and manufacturing

Growth

- **Headline Growth (Inc add companies)**
  - Revenue +13% (2% CAGR)
  - Employment +23% (3.5% CAGR)
  - Profit +53% (7.4% CAGR)
  - GVA +79% (10.2% CAGR)
  - GVA/employee +45% (6.5% CAGR)
  - Employee benefits + 49% (+6.9% CAGR)
  - No. Companies +4% net



6 year growth

- **Like-for-like (500 companies)**
  - Revenue +1.7% (0.3% CAGR)
  - Employment +10% (1.7% CAGR)
  - GVA +64% (8.6% CAGR)
  - GVA/employee +49% (6.9% CAGR)

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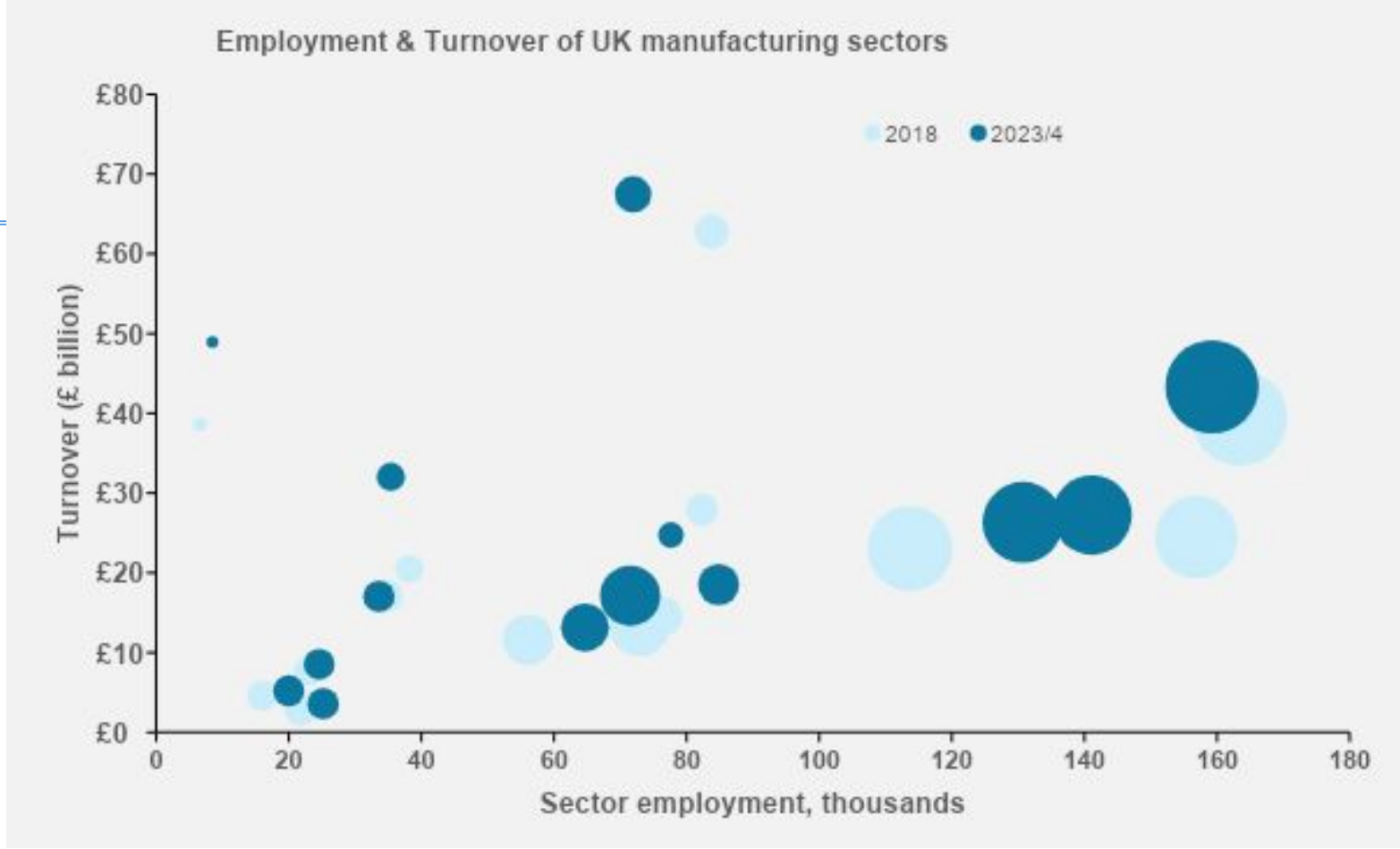
UK Industry comparisons

- Acoustics size ≡ Steel / elect components
  - Beware SIC codes
- Growth >2X UK Manufacturing
- Productivity 26% > UK manufacturing average

- Key underpinning enabling industry



Compaion to UK Gov ONS SIC code data

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Relevance:

- Economy depends on acoustics
- Underpins priority sectors

- Advanced Manufacturing
- Defence and Security
- Clean Energy
- Digital Technologies and AI
- Life Sciences & Healthy living

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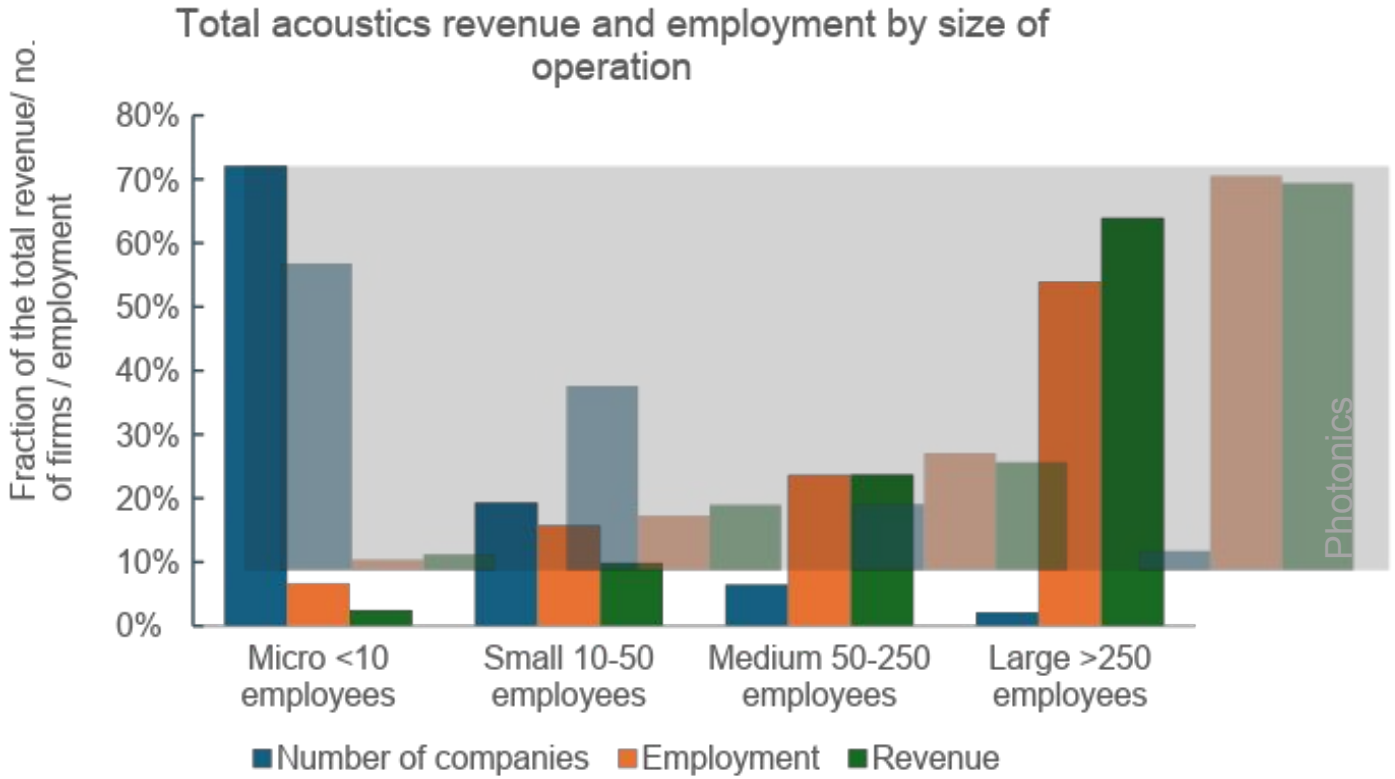
National distribution

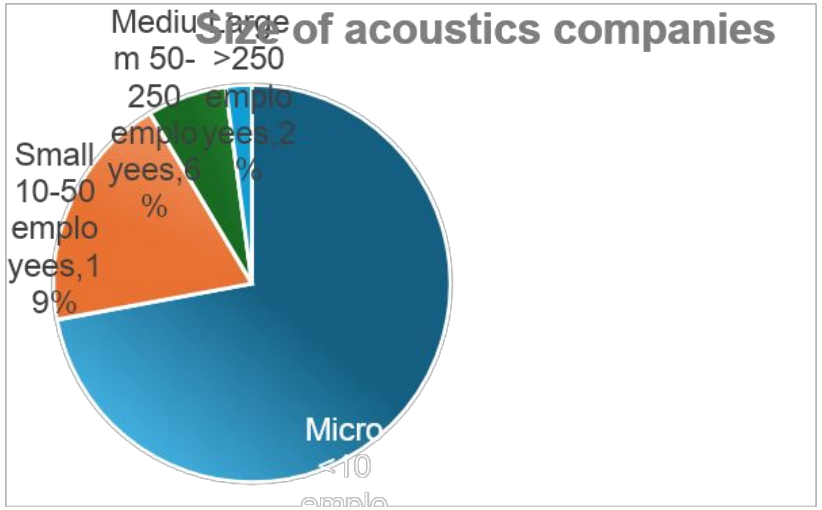
Region	Output	Employees	GVA/ employee
Scotland	£490m	1,130	£ 141,000
Northern Ireland	£10m	30	£ 86,000
North East	£170m	400	£ 76,000
North West	£860m	3,410	£ 89,000
Yorkshire & Humber	£140m	750	£ 87,000
East Midlands	£520m	1,520	£ 110,000
West Midlands	£700m	1,430	£ 103,000
Wales	£180m	470	£ 96,000
East of England	£580m	2,180	£ 86,000

- Five regions >£0.5bn revenue
  - North West to South East
- Productivity Highest in Scotland & Midlands
- Estimate only, no all locations for all companies

Profile

- Over 90% acoustics operations employ <50 people
- Majority of Revenue and employment from large companies
  - Macro economics standard
  - Efficiency of scale & acquisition
- Small and micro are companies heart of innovation

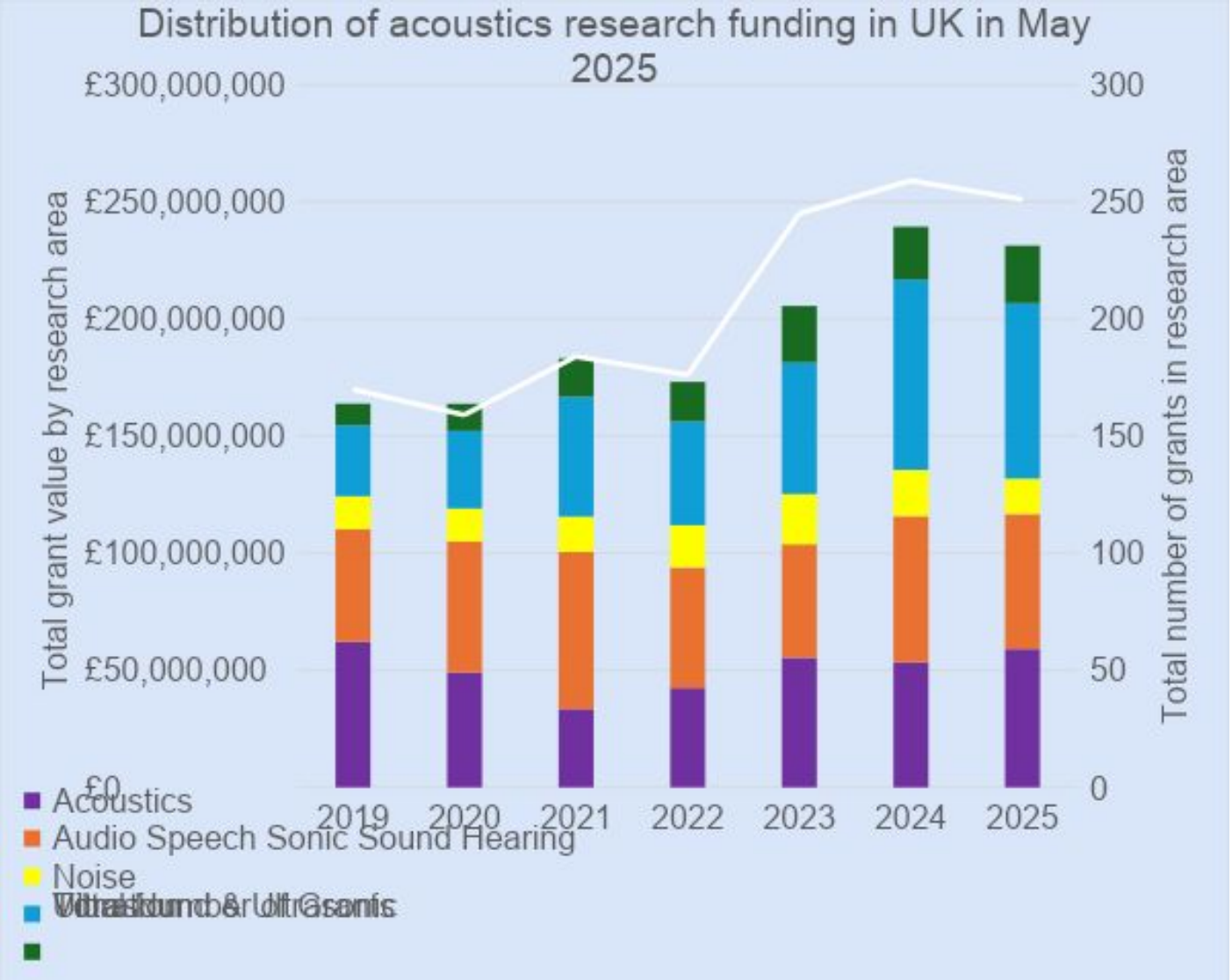




Innovation Base

- 37 institutions active grant(s)
  - Glasgow, Imperial, Sheffield most prolific
  - Ultrasonics and fundamental acoustics most active
- Supported by full range of research councils
  - Arts and Humanities to Life Science and Engineering

- Diversity = Economic resilience
- Diversity = Underpinning Impact
- Diversity = Dilution of message



Global Impact

- No global statistics for acoustics in combination
- Key sub-sectors
  - $15-21bn Acoustics insulation
  - $9.6-16bn Ultrasound
  - $5-19bn Speech and voice recognition
  - $6.9bn Sonar
- Top four projected to grow $60bn by 2030
  - End markets from health to defence to consumer

Recommendations

1.Leadership body to convene industry, government and academia ….

Department for Business and Trade to increase international awareness of UK acoustics...

Review of UK acoustics capital infrastructure and access to resources vital for expansion…

Stronger collaboration between professional bodies to ensure that acoustics is entrenched in design….

Provide broader opportunities for upskilling of the acoustics workforce across all career stages….

- Which should be prioritised?
- How and who to action?
- Detailed definition?
- Timescales?
- Success?

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