

The logo for the Association of British Orchestras (ABO) features the letters 'A', 'B', and 'O' in a white, serif font. The 'A' and 'B' are connected, and the 'O' is a simple circle. The letters are centered horizontally and positioned above the full name of the organization.

ABO

ASSOCIATION OF BRITISH ORCHESTRAS

The title of the report, 'THE STATE OF UK'S ORCHESTRAS IN 2019', is written in a teal, sans-serif font. It is positioned to the right of the ABO logo and is centered vertically relative to the logo's height.

THE STATE OF UK'S ORCHESTRAS
IN 2019

SUMMARY

The State of the UK's Orchestras in 2019 is an update on key statistics for the orchestra sector last delivered in 2016 and reveals one of the greatest cultural success stories of recent years.

Based on a survey of members of the Association of British Orchestras (ABO), it shows how our orchestras have weathered a decade of financial uncertainty by making the very most of vital public investment to explore new markets for their work and sustain - and in some parts of the sector, increase - the number of concerts they perform.

It demonstrates too their role in giving hundreds of thousands of children, young people and adults the chance to hear and take part in the highest calibre classical music – both in the concert hall and out in communities across the country.

Above all, it shows how our orchestras are successfully innovating and finding new sources of income to match the public investment that they receive.

3,583

3,583 concerts and performances in the UK

c.700k

Almost 700,000 people attending education and outreach performances or events or attending or taking part in sessions for education, training or taking part

£148.6m

£148.6m - total income

512

512 recordings for radio/free audio streaming or download

4.25m

4.25 million - attendance at all UK concerts and performances

40

Toured to 40 countries

LIVE PERFORMANCES

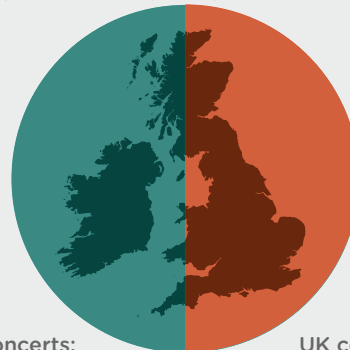
Our orchestras delivered almost 3,600 UK concerts and opera or ballet performances during the year, playing live to a total audience of 4.25 million people.

The number of UK concerts not including opera and ballet rose slightly (by 3%) compared to 2016 and although figures appear to show a 14% fall in the number of performances as part of opera or ballet this was largely due to temporary closure of a key opera venue. Adjustments for the closure show there was actually an increase of more than 8% in the number of opera and ballet performances.

The total live audience figures show that attendance at concerts and opera/ballet with orchestral performances is broadly holding steady compared to 2016 and there are signs of growth amongst the sector's 'newest shoots', with some newer chamber ensembles increasing the number of concert performances they gave.

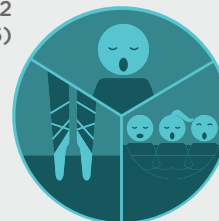
**UK concerts
and performances:
3,583**
(-3% vs 2016)

**Attendance at all UK
concerts and performances:
4.25m**
(+1% vs 2016)



**UK concerts:
2,402**
(+3% vs 2016)

**UK concert attendance:
2.6m**
(+2% vs 2016)



**Performances as part of opera,
ballet: 1,181**
(-14% vs 2016)

**Opera/ballet attendance:
1.66m**
(-0.7% vs 2016)

UK ORCHESTRAS IN THE COMMUNITY

UK orchestras delivered an incredible range of activities involving a total of almost 700,000 people of all ages during the year.

These included almost 1,300 performances or other events dedicated to giving children and young people unique opportunities to listen to or perform music. Almost 320,000 children and young people attended these education and outreach performance events.

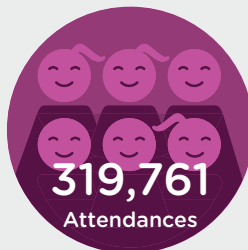
Our orchestras also delivered 11,570 sessions for education, training and taking part, with more than 370,000 people of all ages attending or getting more actively involved.



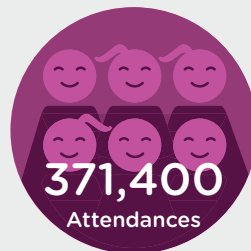
Performances or events for, by, or with children and young people: 1,293



Sessions for education, training & taking part: 11,570



Attendance of children and young people at education and outreach performances or events: 319,761



Attendance at sessions for education, training or taking part: 371,400



Total attendance of children and young people at education and outreach performances or events and people of all ages at sessions for education, training or taking part: 691,161

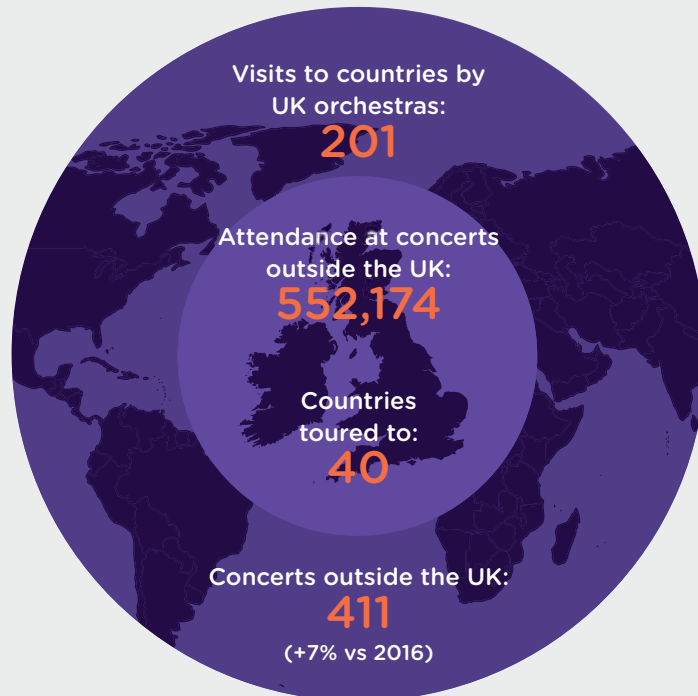
UK ORCHESTRAS IN THE WORLD

Orchestras continue to fly the flag for the UK around the world, with a 7% increase in the number of concert performances given outside the UK compared to 2016 and orchestras successfully adding new destinations to their tour itineraries.

2019 figures show how the orchestras visited a total of 40 different countries and performed 411 concerts. Europe was the most toured-to continent, with our orchestras visiting 22 different countries and making 154 of their 201 foreign trips to the continent - but we reached far and wide.

Within Europe, Germany, Netherlands, Spain, Austria, France and Italy were common destinations but our orchestras performed all over the world and to international concert audiences far in excess of 550,000 people.

This year's survey confirms the popularity of UK orchestras in the USA with no fewer than ten visits to the country. It also shows how they are successfully breaking into new markets, with orchestras making 10 visits to China, five to the UAE, three visits to Japan and South Korea each; two each to Thailand, Turkey and Vietnam and one each to Brunei, Cambodia, Laos, Malaysia, Philippines and Singapore.



BEYOND THE CONCERT HALL

Our orchestras continue to extend their reach by delivering new recordings and broadcasts. In fact, 2019 marks a 15% increase in recordings for CD or paid audio download and an even bigger rise – 18% - in the number of recordings for radio/free audio streaming or download.

Demand for recordings and broadcasts for film/TV or audio-visual streaming or download was down 20% from the 2016 figure but is typically cyclical and based on a complex range of factors.



Recordings for CD or paid-for audio download: 171 (+15% vs 2016)



Recordings for radio/free audio streaming or download (live, recorded or on-demand): 512 (+18% vs 2016)



Recordings/broadcasts for film/TV or audio-visual streaming/download (live, recorded or on-demand): 82 (-20% vs 2016)

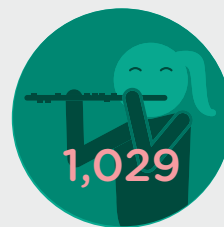
CREATING JOBS

Orchestras continue to employ significant numbers of musicians, with a total of 2,145 musicians holding member status with freelance orchestras or permanent contracts.

Non-UK EU nationals make up 8% of the permanent or member status musicians, a similar proportion to the 2016 figures. This suggests that any potential Brexit effect has yet to take place though further research would be needed to explore this.



Musicians employed on permanent or long-term contracts: 1,116 (no change vs 2016), of which 69 were EU nationals (excluding UK citizens).



Musicians holding member status of freelance orchestras: 1,029 (-3.4% vs 2016), of which 95 were EU nationals (excluding UK citizens).



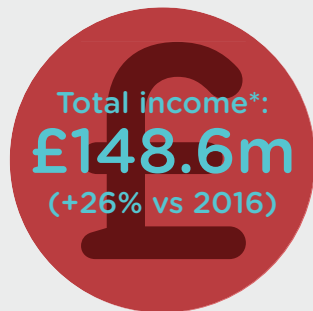
Musicians employed as extra or deputy players: 11,917

SOURCES OF INCOME

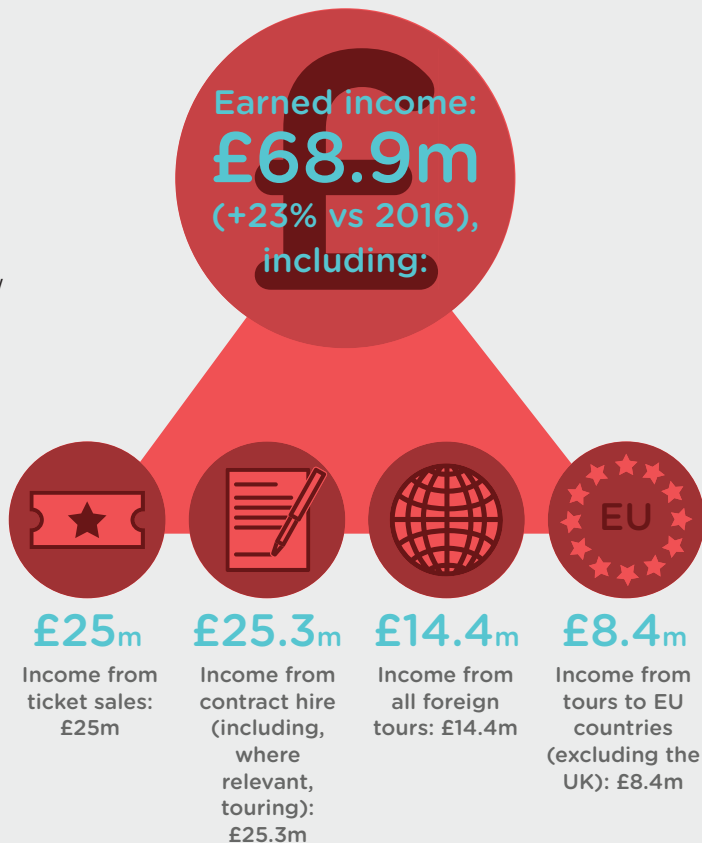
Many of the UK's orchestras appear to be successfully using public funding to build resilience and the agility needed to grow their other income streams.

The 2019 survey reveals a 26% increase in their total income since 2016 (income for 2019 was a total of £148.6 million). The overall increase is made up of similarly proportioned increases in earned income (from ticket sales and tours etc) and contributed income from donations and grants. The survey also shows how UK orchestras are driving inward investment by increasing the amount of overseas sponsorship they attract.

Orchestra Tax Relief is also clearly playing a part in helping orchestras both sustain the number of concerts they perform and strengthen income bases and contributed just over £10 million of the £148 million total income. The increase in total income from 2016 falls to 17% when Orchestra Tax Relief is removed.

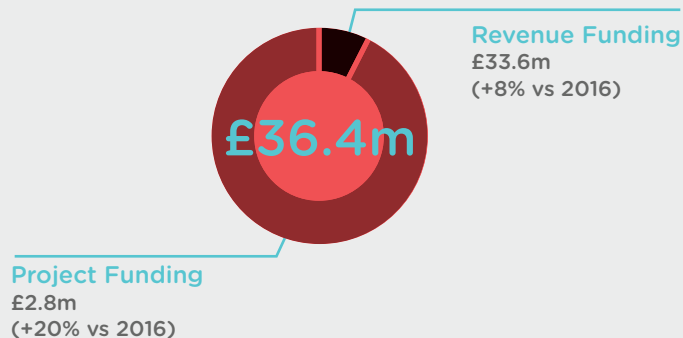


* Finance data is based on 38 orchestras who completed this section of the survey. This data does not, therefore, include the BBC orchestras who operate on a slightly different model.



However, although many of the surveyed orchestras receive Arts Council or government funding, 19% of the comparative sample did not, and a further 32% of orchestras said their funding was at a standstill compared with 2016 – even before allowing for inflation. The survey highlights too the scale of further reductions in local authority funding for orchestras, recording a 14% decrease for 2019 on top of the 11% fall recorded in 2016.

Arts Council/government funding:
£36.4m (+9% vs 2016)



£6.1m
Local Authority
funding:
£6.1m
(-14% vs 2016)



£30k
Creative Europe
Funding: £30k



£10.4m
Orchestra Tax
Relief: £10.4m



£25.5m
Contributed
income:
£25.5m (+30% vs
2016)



£703k
Overseas trusts and
foundations
£703k



£2.3m
Overseas sponsors/
donors
£2.3m

SURVEY EXPLANATORY NOTE

The ABO surveyed the UK's professional orchestras about their activities, audiences, incomes and musicians between July and November 2019.

Responses were received from 44 of the 60 ABO members. Actual numbers for activities in the 2019 dataset are based on returns from all 44 orchestras, and finance numbers are based on responses from 38 orchestras. However, the % change figure (the difference in performance between 2019 and the last survey in 2016) is calculated slightly differently. For comparisons of non-financial data we have used the returns of 40 of the 44 orchestras which also completed the 2016 survey.

Financial comparisons are based on the returns of a smaller core sample of 31 of the 44 orchestras.

A longer technical note for this survey is available at: abo.org.uk/what-we-do/championing/publications.



ASSOCIATION OF **BRITISH ORCHESTRAS**

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The ABO is the national body representing the collective interests of professional orchestras, youth ensembles and the wider classical music industry throughout the UK. The ABO's mission is to enable and support an innovative, collaborative and sustainable orchestral sector by providing advice, support, intelligence and information to the people who make British orchestras a global success.

