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BOP
Consulting

Research into the classical music ecosystem

Prepared by BOP Consulting for the BBC, March 2022

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Executive Summary

Executive Summary

BOP Consulting were commissioned to produce an evidence review and snapshot of the classical music sector in the UK and its civic, social, cultural and economic value at international, national, regional and local level.

This report is based on findings prepared for and presented to BBC in March 2022 and has subsequently been edited in-house for publication.

We found that the BBC has a unique and integral role in the UK's classical music ecosystem – a role which has been emphasised as the sector faced the challenges of the pandemic – and are highly regarded internationally.

The orchestras and choirs supported by the BBC have a distinguished history, complemented by those funded through the arts councils (Arts Council England, Creative Scotland, and the Arts Council of Wales and Northern Ireland) and with support from national and regional government bodies.

Covid has had a significant impact on the sector. It has accelerated some existing audience and digital trends and exposed the insecurity and inequalities present in the classical music training cohort and workforce.

While there are some indications of recovery, it appears that changes in audiences and digital streaming has had a significant impact on how classical is accessed and explored.

This presents a golden opportunity for the BBC to leverage its role to drive the classical music sector forward, prioritising appreciation, education and accessibility, maximising value for audiences and communities across the whole of the UK.

Developing audiences across the UK

The BBC plays a **role in serving and showcasing the UK's nations and regions** where much of the rest of the funding and infrastructure is concentrated in the South East.

- London-based Arts Council National Portfolio Organisations (NPOs) receive a significant amount of funding for organisations with a classical music focus.
- BBC orchestras perform in parts of the UK which otherwise would not be covered by major orchestras. There is an appetite for all of the Orchestras to have deep, sustained relationships with their local communities.
- BBC was identified as a valuable platform for niche music, including that with local relevance e.g Celtic Connections.

Audience market outlook

Classical audiences skew older, whiter and more affluent than the population as a whole. While this is still the case, the pandemic has accelerated an **upward trend in the number of young people consuming classical music through on-demand** streaming services.

- In 2018/19 nearly 80% of audiences at live classical audiences were 55 or over.
- Over half (54%) of Radio 3's audience are within the more affluent AB social grade – this compares to 27% of the UK population.
- In the last year, 31% of Deezer's Classical UK listeners were under 35yrs and this group is most likely to have listened to classical music during lockdown.

Global profile

Classical music in the UK has a **global reach and profile** in which the BBC is an integral part.

- London is at the forefront of the UK's international profile and has more orchestras, opera houses and youth orchestras than New York, Berlin or Tokyo
- Each year BBC concerts represent between 10-12% of European Broadcasting Union (EBU) broadcast requests – the highest proportion of any of the 112 other members from 55 countries.
- The Proms is integral to international profile, attracting top international talent
- UK new music output – BBC commissions have a central role – and innovations in approach to outreach and education are major contributors to UK reputation

Commissioning and talent development

The BBC plays a **major role as commissioner, employer and platform** for new talent. BBC's capacity to take risks with repertoire has been especially valued through the pandemic 'survival mode' notably, royalties from broadcast and commissions provided employment opportunities.

- The BBC is the single biggest commissioner of new music works in the UK
- 22% musicians and 28% composers reportedly considered leaving the music industry as a result of the pandemic
- BBC performing groups and platforms such as the Proms play vital role in the 'pipeline' of new talent

Diversity

The Classical music sector has much more to do to support a workforce and an audience that reflects the wider population audience. The BBC is supporting those efforts.

- Percentage of BBC Radio 3 commissions by female composers rose from 8% in 2011 to 50% in 2019.
- Greater diversity in Radio 3 presenters is valued for giving the sector more accessible image
- There is scope for the BBC to align with **key strategic priorities** from DCMS and Arts Council England **relating to inclusivity** by maintaining and accelerating efforts to reach and reflect the full diversity of the UK

Music education

Music education in the UK is uncoordinated particularly across socio-economic divides resulting in major **gaps in provision**. Participation in music education in England, Wales and Northern Ireland has declined in recent years; this exacerbated by the pandemic.

- In 2021, the numbers of A-level music students has dropped by almost a third since 2014
- 50% of children at independent schools receive sustained music tuition compared to 15% of state schools pupils
- Ten Pieces is widely perceived as 'exemplary' – but BBC education initiatives are not part of key government music education strategies

Digital

The sector is uncertain about the commercial and creative potential of digital, and has not seen a ‘transformational’ moment yet.

- Increase in digital activity over the pandemic has helped classical organisations collect better data to understand their audiences – the BBC is behind when it comes to data collection on live audiences
- Curated playlists are the most popular way streamers listen to classical music.
- Sector stakeholders have identified **untapped potential for digital innovation** in music education platforms and tools, visualisation and eventing, social media and marketing and data-driven audience journeys.

Economic value and income models

The pandemic saw a collapse in the music sector’s contribution to the UK economy. The Cultural Recovery Fund has largely safeguarded classical music institutions, although future audience behaviour, challenges to international touring and the scheduled end of the Orchestra Tax Relief may impact on orchestra business models in future.

- Music industry employment (all genres) plunged by 35% from 197,000 in 2019 to 128,000 in 2020
- Music industry’s (all genres) GVA contribution fell 46% from £5.8bn to £3.1bn in 2020
- Global classical streaming revenue rose by 46% between 2017 and 2018 to \$141m

Introduction

- **Scope**
- **Methodology**

Introduction

The BBC has a unique role in classical music in the UK. It is a major supporter, promoter and distribution channel for classical music through its broadcast and streaming output and directly employs and manages nine ensembles, including five full-time orchestras.

Given significant changes to the cultural sector brought about by both the pandemic and digital advancements, the BBC is seeking to review its classical music footprint.

In support of this, in January 2022 BOP Consulting were commissioned to produce an **evidence review and snapshot of the classical music sector** and its civic, social, cultural and economic value at national, regional and local level.

The outcomes of this research positions the BBC's classical music activity within the wider context of the sector in the UK and more broadly in an international context and looks to identify trends in the sector over the next five to ten years.

In this context, the report identifies key opportunities and areas for further consideration for the BBC as part of a wider-scale review, as indicated.

Live classical music

- **Audiences**
- **Geography**
- **Funding**
- **Workforce**

Overview: Live Classical Music in the UK

Classical audiences relatively stable – but they are not representative of the population

Activity and funding concentrated in London and SE – BBC plays a role serving UK nations & regions

Local authority funding in decline – challenging funding environment for orchestras

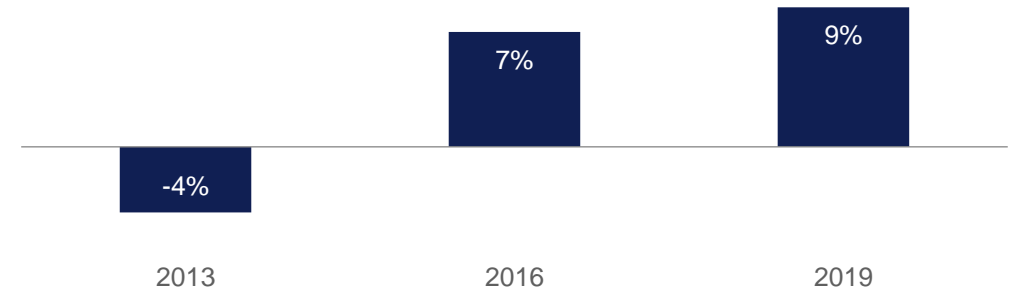
Covid: significant impact on workforce but Cultural Recovery Fund has protected institutions

Pre-Covid (2013-2019): more concerts and busier orchestras

The overall number of concerts and performances increased between 2013 – 2019:

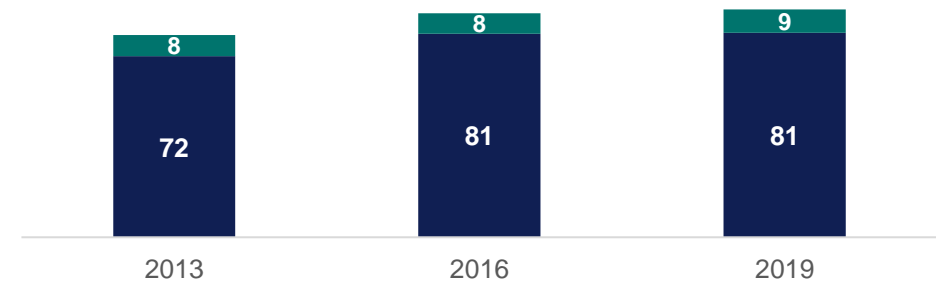
- There were **5,500 – 6,300 live classical concerts performed in the UK** over each of these years.
- Orchestral concerts were the majority (approximately 60 – 65%). Chamber music and sinfonietta (small/chamber orchestras) accounted for the rest – these show a slight decrease.
- Orchestras performed on average 91 concerts in 2019 compared with 81 concerts in 2013 (ABO data).
- The average number of touring performances also rose slightly - 9 concerts in 2019 compared with 8 concerts in 2013.

Figure 1. Percent change in the total number of concerts and performances (2013-2019)



Source: ABO (2019) / BOP Consulting (2022) Note: Change in percent refers to change from previously recorded year. For 2013, previously recorded year was 2011.

Figure 2. Average number of concerts and performances by a UK orchestra per year (2013-2019)



■ Average number of concerts by a UK orchestra per year (Touring)
■ Average number of concerts by a UK orchestra per year (UK)

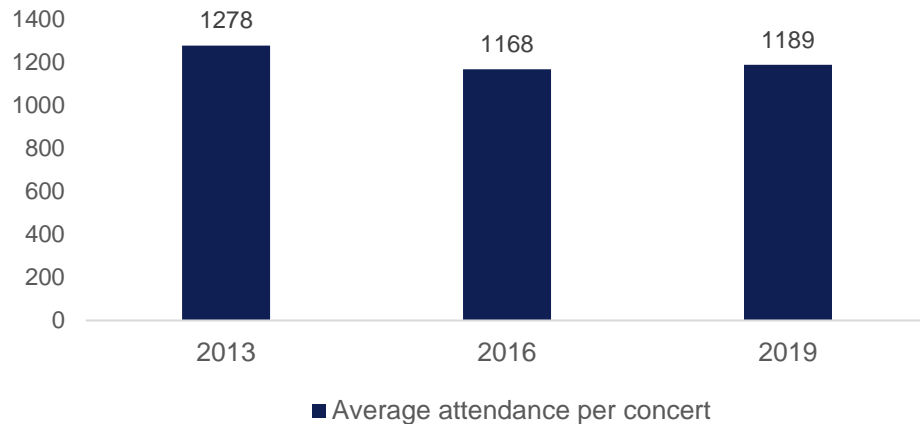
Source: ABO (2019) / BOP Consulting (2022)

Pre-covid (2013-2019): attendances at classical events stable over the last decade

The **average attendance per concert/performance** was slightly lower in 2019 than in 2013 but has **remained relatively stable**.

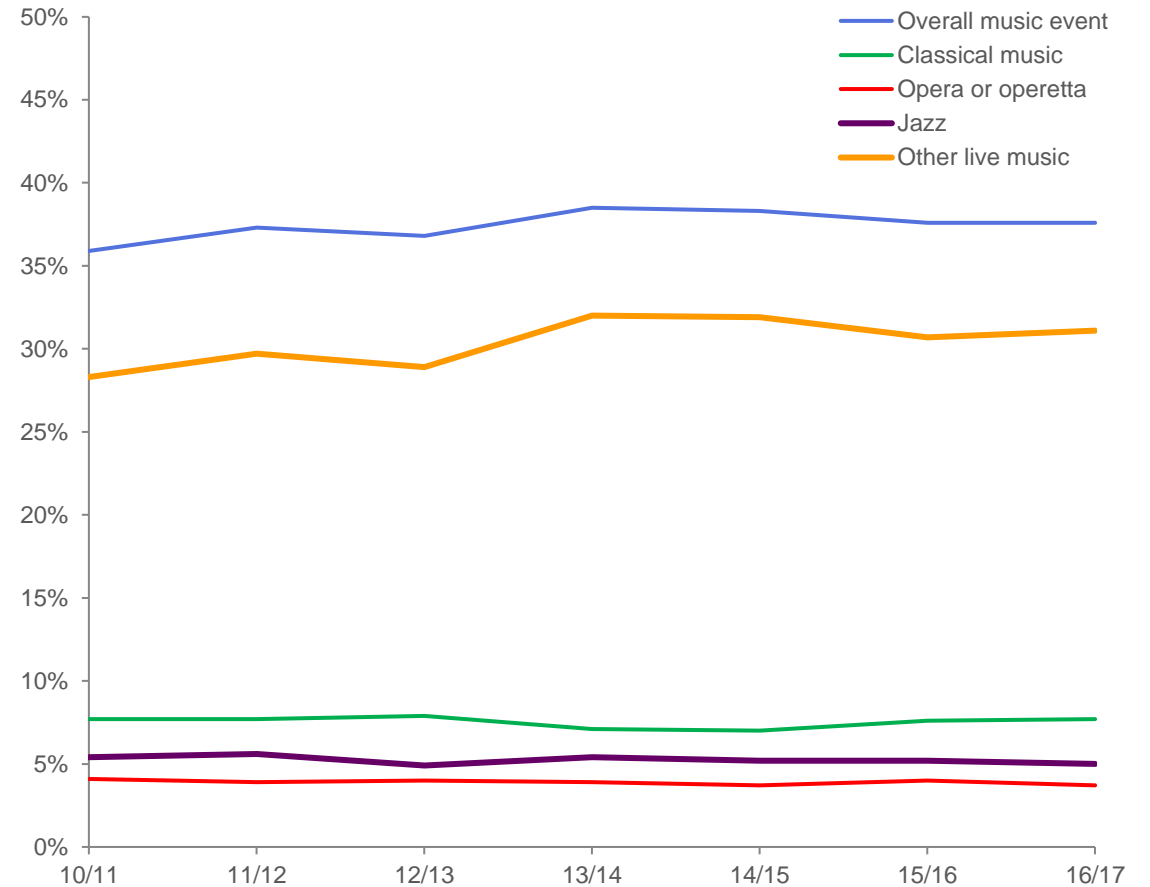
Attendance overall at music events (all genres) by the adult population in England has increased slightly between 2010 – 2017, while **the proportion of adults attending classical music events is comparatively lower** in the past decade.

Figure 3. Average attendance per orchestral concert / performance in the UK (2013-2019)



Source: ABO (2019) / BOP Consulting (2022)

Figure 4. Percentage of English adults who have attended a music event at least once in the past 12 months by musical genre



Source: Arts Council England (2017) / BOP Consulting (2022)

Pre-Covid (2018-2019): Live classical audiences are not representative of the country

Nearly 80% of attendees aged 55 and over

Table 1. Audience figures for classical music events by age, UK-wide (2018/2019)

Age group	Percentage
16-24	2%
25-34	6%
35-44	5%
45-54	10%
55-64	20%
65 or older	58%

Source: The Audience Agency (2020) / BOP Consulting (2022)

Less ethnically diverse audience than overall UK population

Table 2. Audience figures for classical music events by ethnicity, UK-wide (2018/2019)

Ethnicity	Percentage
White: British	84%
White: Other	11%
Mixed: Multiple ethnic background	2%
Black or Black British	0%
Asian or Asian British	2%
Other	1%

Source: The Audience Agency (2020) / BOP Consulting (2022)

Slightly higher percentage of men

Table 3. Audience figures for classical music events by gender, UK-wide (2018/2019)

Gender	Percentage
Male	53%
Female	47%
Non-binary	0%

Source: The Audience Agency (2020) / BOP Consulting (2022)

Covid-19 has left the classical music ecosystem facing significant workforce challenges, especially the live sector

Venue technicians

- Many left the sector during Covid-19 – especially those employed as freelancers, who found it more difficult to access government support
- This now creates significant staffing problems for venues, with many struggling to fill vacancies

Musicians

- At the end of summer 2021, 83% of professional musicians (all genres) reported that they were still unable to find regular work
- 22% reported that they were actively considering leaving the industry

Composers

- Almost half of composers saw a 50% or more drop in work in 2020, and 90% have seen a significant proportion of future work delayed, postponed or cancelled
- Nearly one third (28%) have considered abandoning their career as a result of the pandemic

Promoters

- Changing restrictions and audience habits have made it more difficult for promoters to plan ahead
- Covid-19 travel restrictions have precluded or limited international touring opportunities – compounding the challenges created by additional Brexit-related regulations

Cultural value

- **Global profile**
- **Commissioning**
- **New talent**
- **Music education**
- **Diversity**
- **Partnerships**

Overview: The cultural value of classical music and the BBC

UK's sector has global reach and profile – Proms and BBC commissions are central

BBC plays major role as employer and platform for new talent

Progress is being made in diversity but there is still much further to go

BBC is woven through ecosystem - partnerships could be more strategic

UK sector has a tradition of excellence and a global profile - supported and enhanced by the BBC

Four key factors contribute to the global profile and quality of UK classical music:

Teaching

- High quality teaching in conservatoires and UK exam system (ABRSM) attracts international students
- UK-trained musicians are agile, quick to learn and adventurous

BBC Proms

- Proms is critical to international profile and reputation of UK classical music and could not be delivered to the same high level by another operator
- International virtuosi (the stars) come to play key festivals including the Proms

Innovation

- Track record in commissioning new music at scale (with significant support from BBC) means UK 'taken seriously' overseas
- UK has pioneered approaches to outreach and community engagement

London

- London is a centre of cultural global excellence including classical music



The BBC is hugely important to the quality of music. It's aspirational, you expect it to be good. If the BBC is coming, everyone pulls up their socks – it's a really important thing

Sector stakeholder

Need for balance between global competitiveness and levelling-up / inclusivity agendas

The BBC is the UK's major commissioner of new music

The BBC is the single biggest commissioner of new concert works in the UK, both in terms of number of works commissioned and overall spending.

- A 2012 BASCA survey found 200 - 300 new works commissioned in the UK per year, amounting to a total annual spend of £800k - £1 million
- BBC Radio 3 commissioned 238 works between 2011 – 2019 across all nations and regions of the UK: an average of 26 works commissioned a year
- In this period, 22% of BBC-commissioned pieces were performed on more than one occasion by BBC orchestras and performing groups
- Of BBC-commissions in this period, 69% were performed by BBC performing groups, 28% by non-BBC performing groups and 3% were collaborations between BBC and non-BBC performers
- The BBC's size and funding structure allows it to take a leading role in innovation and the diversity of commissions – it can make 'risky' commissions and provides an important platform new composers

The sector faces challenges in presenting new music:

- Composers report an increasingly competitive commissioning environment and difficulty securing funding (nearly one third considered changing career during Covid)
- Commissioners have also noted the difficulty in commissioning new composers due to funding constraints which limit the necessary lead-time for composers to create new work
- Promoters can find it difficult to attract audiences for new works, especially outside of urban centres

“ Major commissioners [...] are a tiny number but account for a fifth of all commissions and a third of all spending. One of these major commissioners is the BBC.

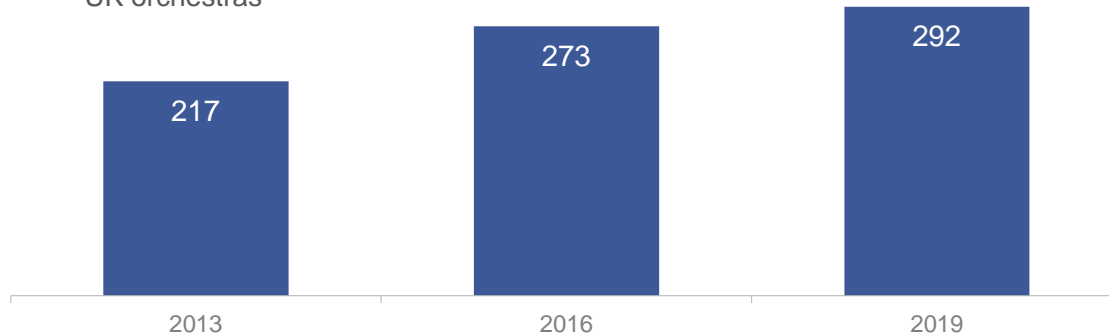
The Commissioner's View (2012), The British Academy of Songwriters, Composers and Authors

UK Orchestras are pioneering new approaches to education and outreach

There has been greater strategic focus on education and outreach activity across the sector, reflected in innovations in programming and partnerships and an increase in outreach and educational work by UK orchestras between 2013 and 2019 (data does not include BBC orchestras).

However, the UK's classical music sector does not realistically have the capacity to 'plug the gaps' in national music education provision.

Figure 16. Average number of performances or events for, by or with children / young people and education and training sessions by non-BBC UK orchestras



Source: ABO (2019) / BOP Consulting (2022)



Then UK is 'best in class' when it comes to education and outreach – but we need a new sense of purpose

Sector stakeholder

Case Study: Shireland CBSO School

Brand-new music school in West Bromwich with the City of Birmingham Symphony Orchestra (CBSO) and Shireland Collegiate Academy Trust in 2023

First school in the UK to be established with an orchestra –non-selective, non fee-paying

Every child will be given the opportunity to learn a musical instrument, with tuition delivered in partnership with Sandwell Music Service

Pupils will participate in choirs and ensembles as well as regularly attending CBSO concerts at Symphony Hall.

BBC is single biggest employer of musicians in an insecure classical workforce

The pandemic exposed the insecurity and precarity that characterises music industry employment, with a rise in freelance 'portfolio careers'. **Employment conditions** for BBC orchestras are **some of the best in the UK** for classical musicians and create secure creative jobs outside of London

BBC Orchestras play a significant role sustaining classical music careers and create a **vital pathway** from conservatoires.

The BBC also provides **platforms** to raise the profile of new talent – musicians, composers and conductors as well as broadcast talent.

New Generation Artists and televised competitions such as Young Musician of the Year represent BBC's commitment to new talent - questions about how these support a diversity of talent (e.g. what % of YMotY competitors are state-school educated?)

“ Classical music in the UK is unthinkable without the BBC Orchestras; they are central to the fragile ecosystem which makes it possible for musicians to live and work here.

Sector stakeholder

Musician's Union statement on BBC, January 2022:

“The BBC is the single biggest employer of MU members in the UK and is in the unique position of supporting five full-time orchestras. The BBC orchestras alone employ more than 400 contract musicians and many hundreds more on a freelance basis.

The BBC also employs and supports musicians working in all genres through its radio and television programming - virtually all MU members will interface with the BBC at one stage of their career”.

- MU General Secretary Horace Trubridge

The sector has made progress on diversity, but still a lot of work to do

The approach of the sector to diversity (in all its forms) and inclusivity has significantly progressed over the past decade. Despite this, there are lots of parts of the sector that are not representative of the UK.

Audiences

- Over half (54%) of Radio 3's audience are within the more affluent AB social grade – this compares to 27% of the UK population
- In line with previous years, 2021 Proms broadcast audiences skew older (70% over 55) and more affluent (65% AB/C1 social grade)

Musicians

- Amongst the orchestral workforce in England, between 3-6% were Black, Asian or from other ethnically diverse groups
- Just 2% of instrument learners have Special Educational Needs

Composers

- Women make up just 21% of commissioned composers and only 7% of orchestral commissions in 2019 were written by women
- Only 7% of commissioned composers were from a Black and Minority ethnic background.
- The percentage of BBC Radio 3 commissions by female composers has increased from 8% in 2011 to 50% in 2019.

Management

- Black, Asian and people from other ethnically diverse background are also significantly underrepresented in management positions, as board members and within other non-musician staff in the classical workforce

Attitudes and consumption habits

- **Modes of consumption**
- **Audience attitudes to classical music**

Overview: Audience attitudes and consumption

Traditionally, young audiences have been more disengaged – but are now more open to new genres

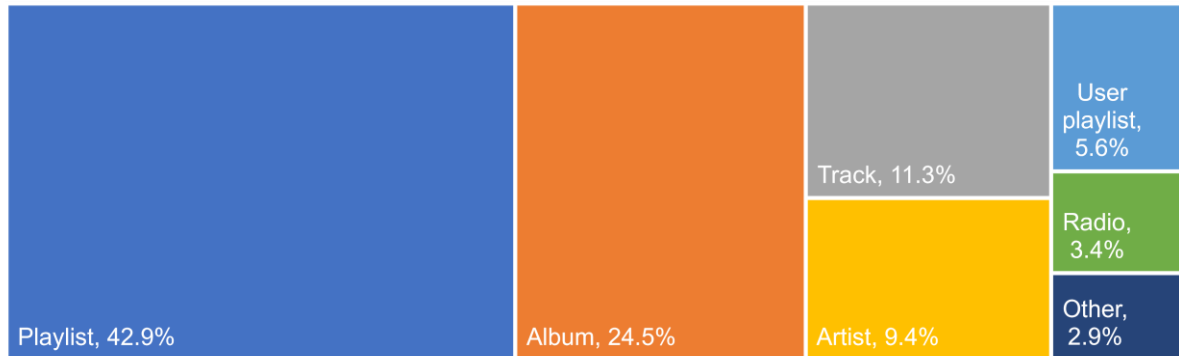
Rise of personalised media and streaming on voice-activated devices

Classical music increasingly recognised for potential contribution to wellbeing

‘Other’ arts and cultural audiences open to learning about classical

Younger audiences have been more difficult to engage with classical music although changing consumption habits bring new opportunities

Figure 19. Sources of Classical Music streams, Deezer, January – June 2020



Source: Royal Philharmonic, Deezer, BPI / BOP Consulting (2022)



Classical music is often associated with older people, but it's exciting to see how mood listening and a new generation of talent can flip this on its head [...] streaming is helping to create a broader fanbase for Classical music and artists

Yannick Fage, Classical music editor, Deezer

New modes of cultural consumption:

Younger audiences:

- Listen on average to **nine different genres**
- Spend much **more time consuming personalised media** (57%) over linear broadcast (15%) and tend to stream classical on **voice activate devices** over mobile
- Prefer shorter clips over concerts

Challenges:

- Classical music audiences skew towards older demographics
- **Disengagement:** 44% of 16-24 year olds said they had 'no interest at all' in classical music
- More likely to have perception that classical music 'not for me'

Opportunities

- Increased focus on **potential of music for emotional wellbeing:** 35% of under 35s felt listening to orchestral music during lockdown had helped them relax and maintain a sense of calmness and wellbeing
- A further 18% said it had **lifted their spirits in isolation**
- Curiosity and openness to new music

More widely, audiences that are engaged with arts and cultural are open to learning more about classical music

- **Interest in learning more about orchestral music increased** from 22% adults surveyed in 2018 to 35% adults at the start of 2020 (pre-pandemic).
- In the same survey, **more respondents were interested in learning more about classical/ orchestral music than any other genre**, and the percentage increase between 2018 – 2020 was also greater than for any other genre. This may be a result of low baseline of classical knowledge among general population.
- A recent study of audiences in ‘crossover areas’ (book festivals, art galleries and multi-art festivals) in Scotland also showed significant openness to engaging with classical music.

A 2020 survey showed adult audiences are learning about orchestral music in a variety of ways, including:

- Through **TV / online documentaries** about the arts (**22% respondents**)
- **Reading** up on the subject (**20%**)
- Following **podcasts** (**19%**)
- **Watching performances** / interviews / live broadcasts from artists on social media (**17%**)
- Exploring **websites** of arts organizations (**15%**)



The orchestras are doing good work but the main problem is visibility. There is no sense that this work is essential and vital part of the cultural fabric of the UK. Much better marketing is needed.

Sector stakeholder

Economic value

- **Economic contribution**
- **Employment**
- **Streaming and recorded revenue**

Overview: The Economic Contribution of Classical Music to the UK

Increasing contribution
to jobs and GVA pre-
Covid

Live: Distributes this
economic contribution
across the UK but
devastated in 2020 and
2021 (Covid-19)

Streaming: Classical
music is increasingly
being
streamed including
during Covid

Growing consumer
appetite: Best ways to
meet and increase
demand in both live
and streaming?

Covid-19: Collapse in music's economic contribution to the UK

Figures published by UK Music quantify fall in music's economic contribution as a result of Covid:

- **Employment plunged by 35%** from 197,000 in 2019 to 128,000 in 2020
- Music industry's **GVA contribution fell 46%** from £5.8bn to £3.1bn in 2020
- **Music exports dropped 23%** from £2.9 billion in 2019 to £2.3 billion in 2020
- These figures are based on UK Music's industry definition that includes musicians, live music, record labels, publishers, recording studios, collecting societies, music managers and music accountants

These fall in 2020 **reversed an established trend** in UK Music reporting of **increasing economic contribution year-on-year** – from a GVA contribution of £4.1bn in 2015 to £5.8bn in 2019 with live music an increasingly large proportion of this contribution.

The collapse in live music performance and touring, both in the UK and internationally, very largely explains the reduced economic contribution in 2020. The **consumption of recorded music remained strong**, with streaming income increasing and vinyl sales up on 2019, according to the BPI.

No reason to believe data on classical are any different from music sector as a whole: collapse in live, growth of recorded revenues after Covid-19.

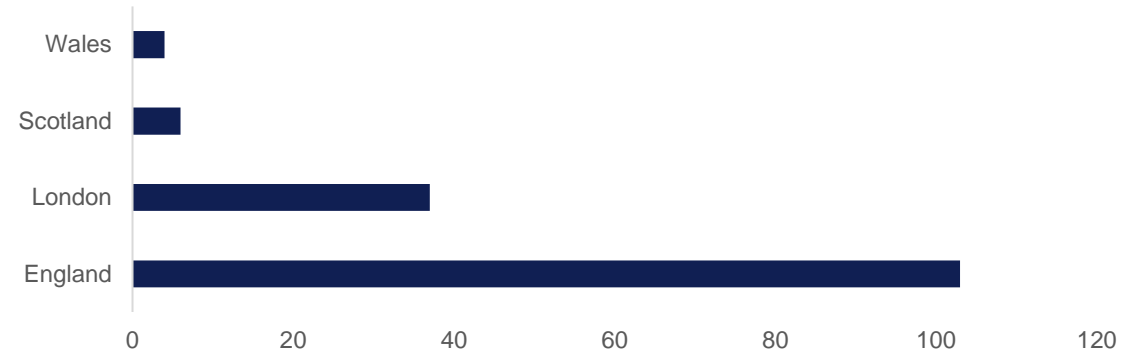
DCMS/ONS data: Economic contribution of music to the UK

DCMS use ONS data to assess the economic contribution of music within a grouping known as Music, Performing and Visual Arts.

Classical Music is likely to follow similar pattern to these data:

- Growth in pre-pandemic period: 19% increase in employment across Great Britain between 2015 and 2019
- This growth entirely driven by live – which then contracted in 2020 (Covid-19), as shown by the falls in 2020 in the bottom 4 ONS industry codes below
- Sound Recording and Music Publishing followed a different pattern – growing in 2020, a year of streaming, rather than gigging.

Figure 20. Music, Performing and Visual Arts Employment (2020, 000s)



Source: ONS BRES (2020) / BOP Consulting (2022)

ONS Industry Codes	GB employment (2015, 000s)	GB employment (2019, 000s)	GB employment (2020, 000s)
Sound Recording and Music Publishing Activities	10	10	12
Cultural Education	6	8	8
Performing Arts	45	52	42
Support Activities to the Performing Arts	8	13	9
Artistic Creation	27	31	23
Operation of Arts Facilities	17	22	19

London has a rich classical heritage – and remains a vibrant music city

London has been a globally significant musical centre for centuries and the city continues to be at the heart of the UK's music economy.

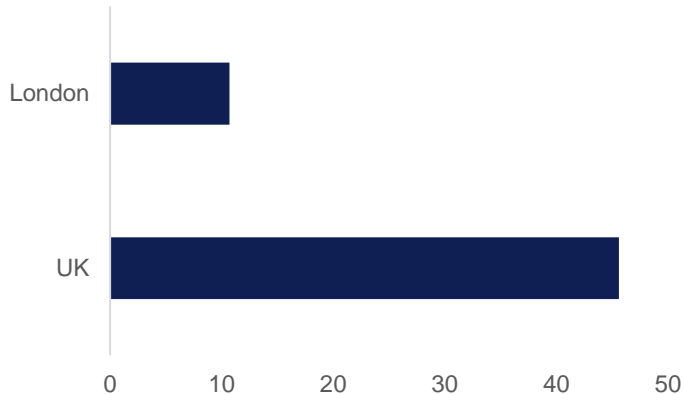
The economic contribution of live music is more dispersed across the country than that of record labels and music publishers. 23% of UK employment created by music tourism (people travelling to attend gigs) benefits London, whereas 67% of the UK's sound recording and music publishing employment (record labels and music publishers) is in London.

Opportunities to build on London's strengths and grow the UK's music economy:

- Agglomeration of major record labels and music publishers – as well as collecting societies and streaming services – in London that is unrivalled elsewhere in Europe.
- Benefits the whole of UK for London's capacities as a centre for music business to deepen, while live venues and infrastructure should be supported to spread the economic benefits of music across the UK.

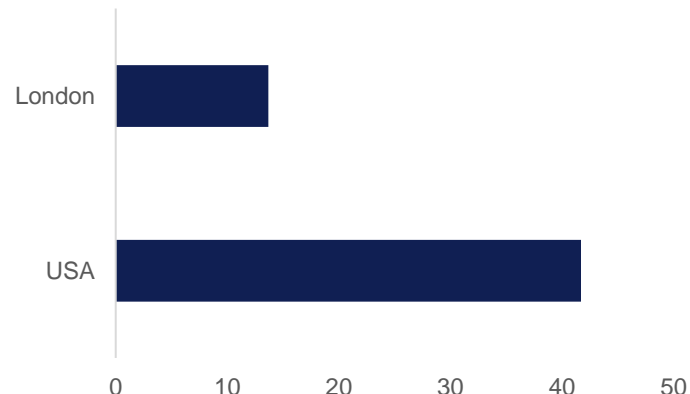
London's music economy compared to the rest of the country

Figure 21. Number of Jobs sustained by Music Tourism (000s, 2019)



Source: UK Music (2020) / BOP Consulting (2022)

Figure 22. Number of Musicians (000s, 2021)



Source: ONS (2021) / BOP Consulting (2022)

Figure 23. Employment in Sound Recording and Music Publishing (000s, 2020)



Source: ONS (2020) / BOP Consulting (2022)

Streaming of classical music is increasing in the UK and globally – assisted by a growing youth audience

Major global recorded market

- Classical recorded music revenues were \$384m globally in 2018
- Classical music was the fastest-growing genre in the UK in 2018 – sales and streams increased by 10.2% compared to 2017, whereas all sales and streams increased by only 5.7%

More younger listeners

- In the last year, 31% of Deezer's Classical listeners in the UK were under 35 years old
- 29% of classical listeners regularly consume classical music via YouTube or Vevo

Growing streaming revenues

- Global classical streaming revenue rose by 46% between 2017 and 2018 to \$141m – benefitting from the emergence of specialist services (e.g. Idagio, Primephonic)
- 17% increase in Classical listeners worldwide on Deezer between April 2019 and April 2020

Increased engagement during Covid-19

- Streams on Deezer's 'Feel Good Classical' playlist grew by 424% in the third week of March 2020 compared to the week before
- Research by the Royal Philharmonic Orchestra found that under 35s were the most likely age group to have listened to orchestral music during lockdown

International comparisons

- **Classical infrastructure in**
 - **UK**
 - **Germany**
 - **USA**
 - **Japan**

Overview: International Comparators

The UK's classical musical ecosystem stands comparison internationally

London is the jewel in the crown of the UK's classical music ecosystem

Distinctive and deep-rooted traditions explain the classical music ecosystems of Germany, Japan and the USA

No broadcaster has equivalent reach and influence to the BBC's in the UK's classical ecology

International comparators show distinctive and deep-rooted traditions

These include:

- The importance of funding from regional and local government to the German classical ecology
- The high levels of philanthropy that drive the classical ecology of the USA
- The drive for excellence within the Japanese classical ecology that goes back to Meiji era (1868-1912)

These attributes are historically and culturally determined:

- Philanthropy is much more of a cultural expectation in the US than in the UK
- Regional and local government in Germany are much stronger than UK equivalents
- Of the comparators, Japan and NHK, the public broadcaster with its own orchestra, is the closest to the BBC.

The BBC is integral to the UK's extensive classical ecosystem

The UK has a large number of orchestras, youth orchestras and opera houses – more than Japan and the USA and almost as many as Germany in per capita terms.

Germany enjoys much more generous cultural funding from local and regional government than the UK but does not benefit from a broadcaster with a classical remit as extensive as that of the BBC.

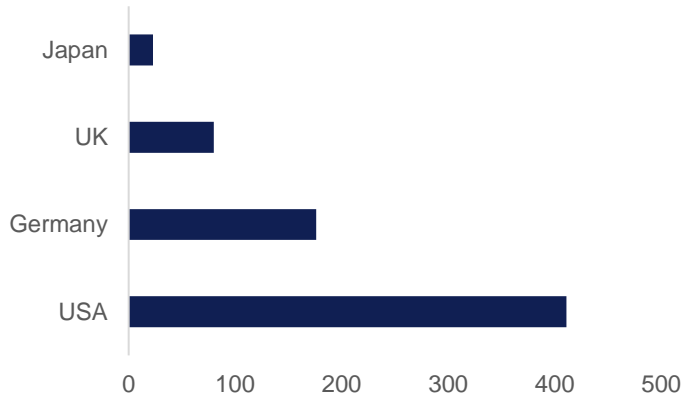
The BBC is recognised as being central to the UK's international standing in classical music – as illustrated by this quotation from a leading figure in the American classical world.

“The UK is recognised as a leader in the overall quality of classical music and particularly for innovation; the reputation of the BBC and especially the Proms is central – it's the greatest music festival in the world.

Sector stakeholder

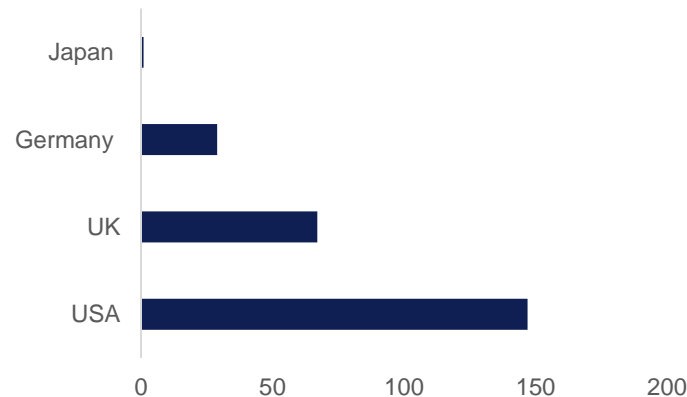
International Comparison of Classical Infrastructure

Figure 24. Number of Orchestras and Opera Houses



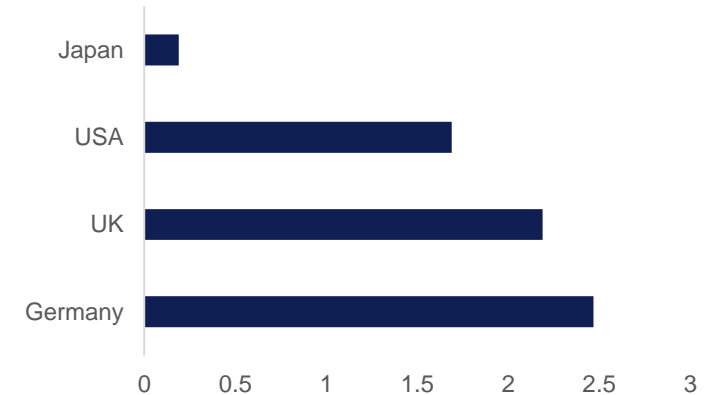
Source: BOP Consulting (2022)

Figure 25. Number of Youth Orchestras



Source: BOP Consulting (2022)

Figure 26. Orchestras, Youth Orchestras and Opera Houses per million people



Source: BOP Consulting (2022)

London has a rich classical music offer as a capital city

London has more orchestras, opera houses and youth orchestras than New York, Berlin and Tokyo. London's performance on these metrics relative to these cities is much stronger than the UK's relative to the USA, Germany and Japan.

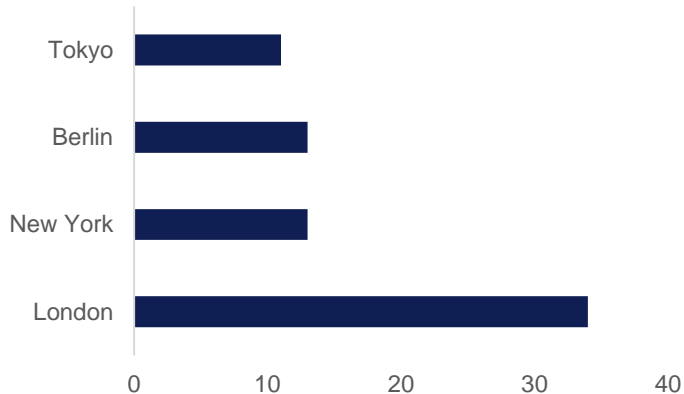
With 4 of the 9 UK conservatoires in London, London is also a major centre for classical music education.

“ London remains one of the world's leading cities and the Mayor is committed to supporting and growing London's unparalleled cultural offer to ensure that it is of benefit to all Londoners.

World Cities Culture Report, 2019

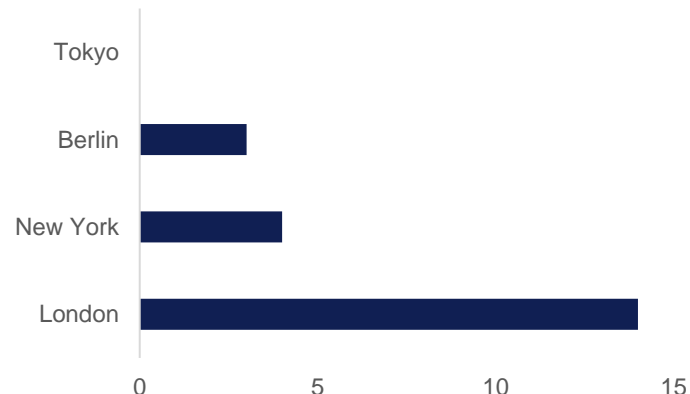
International Comparison of Classical Infrastructure

Figure 27. Number of Orchestras and Opera Houses



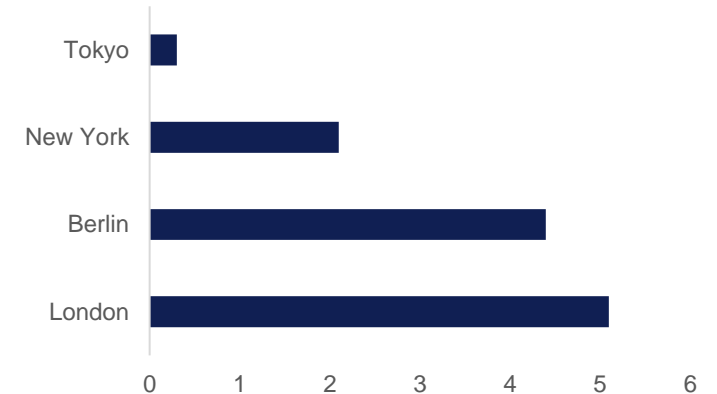
Source: BOP Consulting (2022)

Figure 28. Number of Youth Orchestras



Source: BOP Consulting (2022)

Figure 29. Orchestras, Youth Orchestras and Opera Houses per million people



Source: BOP Consulting (2022)

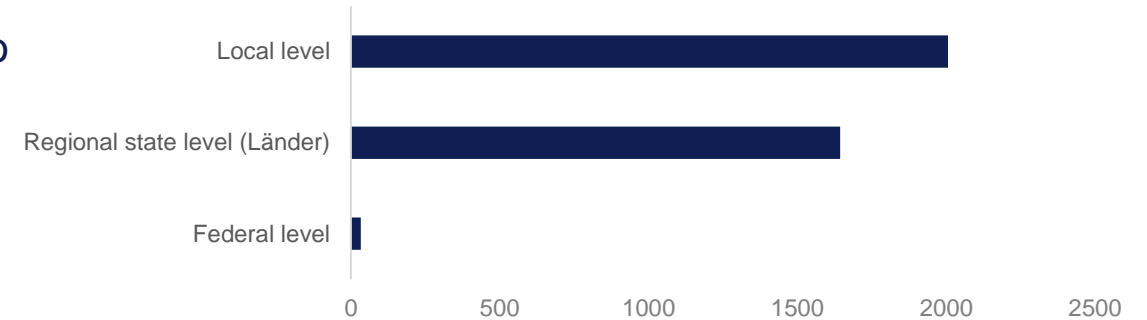
German classical excellence is driven by local and regional funding

Strong local and regional tiers of government are a distinctive feature of German politics and administration.

This is reflected in the importance of these tiers of government to German cultural funding and a robust classical music ecology.

Consequently, Germany has more professional orchestras than any other country including 13 maintained by public radio stations.

Figure 30. Expenditure on theatre and music by different tiers of German state (2015, €m)



Source: BOP Consulting (2022)

Scale	Financing	Public broadcaster
<p>Germany has 130 professional orchestras, many more than most countries, with around 10,000 members. This includes 80 theatre orchestras, 30 concert orchestras and 13 radio orchestras.</p> <p>The international prestige of the Berlin Philharmonic means that it has held an A rank from the German Orchestra Association (DOV) for over a century. Other A-orchestras now include the Staatskapelle Dresden, the Munich Philharmonic, the Staatskapelle Berlin, the Leipzig Gewandhaus Orchestra and the Bamberg Symphony.</p>	<p>German orchestral system originates in the 18th and 19th centuries, when Germany was composed of city-states and courts, each with its own theatre and orchestra.</p> <p>Funding from local and Länder is crucial to maintaining this diverse high-quality provision across Germany. Localised public funding is complemented by philanthropy and commercial revenues – including those generated by broadcasts and performances for public radio stations.</p>	<p>Public radio stations broadcast classical music and operate 13 orchestras, including symphony orchestras.</p> <p>These large orchestras are dispersed across the country in Hamburg, Berlin, Cologne, Leipzig, Frankfurt, Stuttgart, Baden-Baden/Freiburg, Saarbrücken and Munich. In addition, there are several smaller radio orchestras.</p>

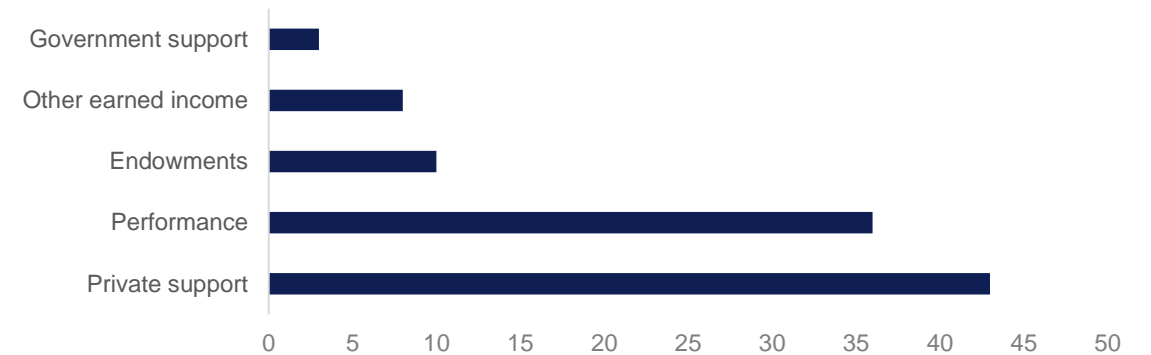
Philanthropy sustains high-quality classical music across the USA

Philanthropy is deeply rooted in American culture and is the most important driver of the classical music economy in the US.

High levels of financing come with significant status and influence for the providers of this finance.

The USA has nothing to compare to the UK especially in relation to the BBC’s financing of orchestras and high profile live events e.g., the Proms.

Figure 31. Source of revenues to USA orchestras (% , 2017)



Source: BOP Consulting (2022)

Scale	Financing	Public broadcaster
<p>160,000 musicians perform in 1,600 orchestras.</p> <p>Adult orchestras alone offered over 25,800 performances - of which 29% were free of charge - and reached over 29 million people.</p> <p>Orchestras exist in all 50 states, serving virtually every community, with annual budgets ranging from less than \$30,000 to more than \$100 million.</p> <p>Two thirds of all orchestras have budgets under \$300,000.</p>	<p>USA orchestras incurred costs of more than \$2.1 billion in 2019 with this spending recycled into the wider American economy.</p> <p>As part of the nonprofit charitable sector, orchestras depend upon private philanthropy and civic support to sustain this spending and to serve community needs.</p> <p>Government support provided only 3% of the income of USA orchestras in 2017 – contrasting with private support (philanthropy) providing 43% and endowments, often a legacy of private giving, 10%.</p>	<p>Public services broadcasters (TV and radio) broadcast local orchestras and some go national e.g., New York Philharmonic concerts on “Live from Lincoln Center”.</p> <p>No media company maintains an orchestra and public service broadcasters have never done so.</p> <p>These broadcasters do, however, have a significant role in the consumption of classical music including through classical public radio stations e.g., WQXR.</p>

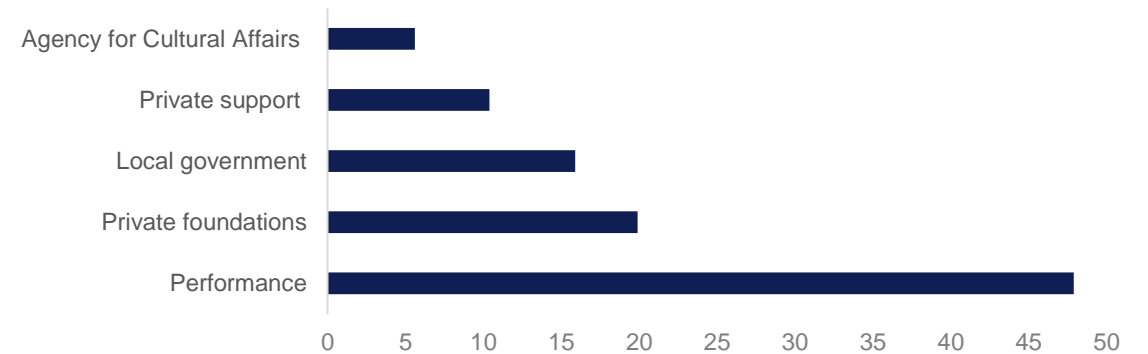
Broadcasters are important to sustaining classical excellence in Japan

The pursuit of classical music excellence in Japan goes back to the Meiji Era (1868-1912).

For the past 50 years, broadcasters have been fundamental - building concert halls, bringing world class musicians to Japan, supporting extensive education initiatives.

While Japan has fewer orchestras than Germany and the USA, it is world-leading in the quality of its wind bands.

Figure 32. Source of revenues to Japanese orchestras (% , 2019)



Source: BOP Consulting (2022)

Scale	Financing	Public broadcaster
<p>Western Classical music was introduced to Japan in the Meiji Era (1868-1912). 38 orchestras now form the Association of Japanese Symphony Orchestras, employing over 2250 musicians. Japan is internationally prominent in the field of wind bands, in addition to symphony orchestras.</p> <p>The All Japan Band Association organises an annual competition among Japanese wind bands involving 800,000 musicians, many school aged. The Tokyo Kosei Wind Orchestra is regarded, alongside the Dallas Wind Symphony, as one of the world's best wind orchestras.</p>	<p>Performance (box office) plays a proportionately larger role in the financing of orchestras in Japan than in Germany (where local and regional government play a bigger role) or the USA (where philanthropy plays a bigger role).</p> <p>There are fewer orchestras in Japan than Germany and USA illustrating the constraints of an economic model dependent on box office income.</p> <p>The Yomiuri Nippon Symphony Orchestra was founded by 3 media companies in the 1960s. Alongside NHK, it underlines the importance of broadcasters to Japanese classical music.</p>	<p>The NHK Symphony Orchestra is a Japanese broadcast orchestra which generated revenues of around £20m in 2019, the highest revenues among Japanese professional orchestras.</p> <p>It benefits from its own concert hall (NHK Hall) and performs at other venues, including Suntory Hall – considered one of the finest in the world for its acoustics.</p> <p>NHK's Chief Conductor is now the Estonian Grammy Award-winning conductor Paavo Järvi – a globally renowned figure in classical music.</p>

Appendices

- **Data sources**

Appendix A: Data Sources

Primary Sources

Concert Diary - <https://concert-diary.com/>

BBC Orchestras & Choirs - <https://www.bbc.co.uk/orchestras/events/by/date/2022>

BBC Orchestras internal data

ONS, BRES

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www.bop.co.uk

www.worldcitiescultureforum.com
