Key Facts 2019
Note on data collection and analysis

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1 INTRODUCTION

The Association of British Orchestras (ABO) surveyed United Kingdom's professional orchestras about their activities, audiences, income and staffing, between 26th June 2019 and 11th November 2019. The survey went out to members of the ABO and was administered by DHA on behalf of the ABO. The design of the survey was reviewed in advance and compared/aligned particularly with the definitions and questions used in Arts Council England's annual monitoring of national portfolio organisations, as the single largest group of commonly funded UK orchestras sits under this umbrella. Orchestras were asked to provide data for the season/financial year 2018-2019 or the closest equivalent 12-month period for which they had meaningful/verified data.

Responses were received from 44 orchestras (which is 73% of those approached), for this survey which is down a little on previous years (2016 had 51 respondents, around 84% of the membership at that time). On the whole, it has been smaller and/or less frequently performing orchestras who have been less likely to respond in this year. 38 (86% of all respondents) provided finance data in this year; it is commonly the case that the BBC orchestras do not individually supply finance data through this survey.

We have used data from the 2016 Key Facts Survey to provide a point of comparison with the 2019 data. When doing so, we take a subgroup of orchestras (40 for non-finance data, and 31 for finance data) who supplied data in both years, so that the inclusion/exclusion of orchestras in either year does not affect the comparative data. Comparative data is included only where it might be meaningful to consider if there is evidence of a trend/change. As such, comparative data is included where data categories contain activity which is likely to be in some ways comparable year on year, and between different orchestras. For this reason, comparisons of work with children and young people, and participatory activities are not included. Much of this work is project-based/funded, and projects can vary significantly in terms of duration, depth/frequency of engagement, size and reach. These variations often relate to projects with very different contexts and purposes, and as such are not suitable for comparison.

Before analysing and reporting the data, the ABO worked with DHA to check and verify data where possible/required and engaged in discussions with individual orchestras where appropriate to understand the 'story' behind the figures where necessary.

This note presents the data from the survey, and includes some brief notes relating to changes and variations in activity across the responding orchestras which should form part of our understanding and analysis of the data. Generally, it is worth acknowledging the challenges in assessing a dataset of this type for potential sector-wide trends. The number of responding units is not huge, and the size and output of orchestras varies significantly. Thus, individual changes within some organisations – whether temporary or permanent – can sometimes affect the wider dataset and need to be recognised where possible.

2 PERFORMANCES AND ATTENDANCE

Orchestras were asked to provide data about their artistic activities.

- UK concerts and performances: 3,583 (-3% vs 2016)
  - UK concerts (not including opera/ballet performances, or performances for, by or with children and young people): 2,402 (+3% vs 2016)
  - Performances as part of opera and ballet: 1,181 (-14% vs 2016)

- Attendance at all UK concerts and performances: 4.25m (+1% vs 2016)
  - UK concert attendance (not including opera/ballet performances, or performances for, by or with children and young people): 2.6m (+2% vs 2016)
  - Opera/ballet etc attendance: 1.66m (-0.7% vs 2016)

We were able to identify that some of the variation from 2016 was related to 'one-off' or orchestra-specific factors. For example, one large opera/ballet organisation had a venue unavailable due to refurbishment for the period which their 2019 response covers; removing this organisation, we can look at the comparative sample and see an increase of +8.5% in the number of performances vs 2016.

In another case, an orchestra reported a change of emphasis in its summer programming, moving some of its performing slots from traditional concerts to concerts specifically for young people. One orchestra identified that their 2016 data reflected an exceptional season in terms of one-off UK concerts. Looking at a cluster of chamber orchestras in the response group, there appears to be some modest, steady growth across a number of orchestras in this area.

3 ACTIVITY FOR CHILDREN AND YOUNG PEOPLE, AND FOR EDUCATION, TRAINING OR TAKING PART

Orchestras run programmes which enable children and young people and adults to participate in a range of activities.

- 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

As we observed earlier, the fluctuation in numbers between 2016 and 2019 is likely to reflect particularly the variation between reporting in types of activities which orchestras undertake, and thus no comparative with 2016 is noted here.

4 TOURING

Orchestras were asked to tell us about their touring activities outside the UK. Europe is the most toured-to continent; orchestras report 154 visits to European countries (out of 201 visits to non-UK countries in total), performing in 22 different European countries. Germany, Netherlands, Spain, Austria, France and Italy are the most common touring destinations across orchestras. Other notable destinations in this year included the USA, China and the United Arab Emirates.

- Number of different countries toured to: 40
- Number of visits to countries by UK orchestras: 201
- Concerts outside the UK: 411 (+7% vs 2016)
- Attendance at concerts outside the UK: 552,174

It is worth noting that the attendance figures are significantly limited by the extent to which orchestras were able to collect this data or not (they typically have no particular role or relationship in the process of marketing concerts and selling tickets, and therefore do not normally collect box office data). What we can see within individual responses is a number of orchestras which engage in quite substantial touring activity, but which do not have the capacity to report attendance figures. Thus, the number included above is an understatement of some proportion.

5 RECORDINGS, STREAMING, DOWNLOADS AND BROADCASTS

Orchestras undertake a range of recording, broadcasting and other activities throughout a year.

- 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)

2016 comparisons are included here, but we know relatively little about the fluctuations which take place in these figures and it may be a useful area for future exploration by the ABO with its members. Whilst in the survey we ask for listener/viewer figures, many orchestras are unable to provide them or only able to offer broad estimates, and so these numbers are not included here.

6 EMPLOYMENT

Orchestras continue to employ musicians in a number of ways. There are two typical approaches to employment: permanent contracted musicians, such as those who play with symphony orchestras like the Halle or the Royal Scottish National Orchestra; and freelance musicians with member status, which is common in the London-based symphony orchestras and across many chamber orchestras and smaller ensembles. In addition, orchestras engage freelance musicians to deputise, work as 'extras' or fill gaps.

- Musicians employed on permanent contracts: 1,116 (+0.09% 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 engaged as extra or deputy players: 11,917
- EU nationals make up 8% of the permanent/long-term or member status employees.

A comparative with 2016 data is included here for the first two groups of musicians, but not for those employed as extra or deputy players. Looking at the data responses from orchestras, reporting of the number of extra or deputy players tends to be less precise and fluctuates significantly; it is likely that this relates partly to the challenge of producing the data, but also to issues of programming and vacancies which may change year on year.

7 INCOME

Producing a meaningful dataset for income across the orchestra respondents provides a challenge where very different kinds of models are included. Many orchestras have similar business and operational models, but those which are part of the BBC, and those which are part of opera/ballet companies or sit within larger venue-based organisations can be very different. BBC orchestras have not provided detailed financial information (and have not done so in previous ABO Key Facts surveys either), and so the figures below present something of a picture of the non-BBC orchestral model. When looking at opera/ballet orchestras, we do not include the whole income picture: instead, using data about the size of their orchestral budget, we include a proportion of their income data below as a rough proxy for the orchestra as separate from the wider concern.

This year is the first Key Facts survey which has taken place in a period in which orchestras are able to access Orchestra Tax Relief (OTR), and so this income line appears as new in comparison with the 2016 data. We have included within the overall income calculation, but it is worth noting that OTR comes back to orchestras in arrears.

When looking at the comparison between 2016 and 2019, we have not included any adjustments for inflation across this period. Orchestras are asked to report the most recent period for which they have available data, and this can vary across respondents according to the financial year which they use, the timing of any audit and publication of annual accounts.

38 orchestras were able to provide data in this year so this data on finances is a partial view of the income which the sector receives.

- Total income: £148.6m (+26% vs 2019; discounting OTR, the increase is closer to +17% vs 2016)
- Earned income: £68.9m (+23% vs 2016), including:
    - Income from ticket sales: £25m
    - Income from contract hire (may include tours): £25.3m
    - Income from all foreign tours: £14.4m
    - Income from tours to EU countries (excluding the UK): £8.4m

- Contributed income: £25.5m (+30% vs 2016)
    - £2.3m from overseas sponsors/donors
    - £703k from overseas trusts and foundations

- Arts Council / government funding: £36.4m (+9% vs 2016)
    - Arts Council / government revenue funding: £33.6m (+8% vs 2016)
    - Arts Council / government project funding: £2.8m (+20% vs 2016)

- Local Authority funding: £6.1m (-14% vs 2016)
- Creative Europe Funding: £30k
- Orchestra Tax Relief: £10.4m

Income stream	**Proportion of total income incl. OTR**	**Proportion of income not incl. OTR**
Earned income	46% (-1pts vs 2016)	50% (+2.5pts vs 2016)
Public investment	29% (-5pts vs 2016)	31% (-3pts vs 2016)
Contributed income	17% (+1pts vs 2016)	19% (+2pts vs 2016)
Orchestra Tax Relief	7% (no comparison with 2016)	
Other	0.3% (-1pts vs 2016)	0.8% (-1pt vs 2016)

- Opera and ballet orchestral budget: £20.2m (+7% vs 2016)

Separately, the five BBC orchestras (BBC Symphony Orchestra, BBC Philharmonic, BBC Concert, BBC Scottish Symphony and BBC National Orchestra of Wales) received £29m net contribution from the licence fee in 2018/2019. The BBC orchestras do not supply a full income picture to the ABO and operate in slightly different circumstances to other orchestras due to the BBC funding model, and connection to BBC broadcast platforms/activities.

Looking generally across the orchestras which were able to provide financial data, only three of the 38 reported on a total income level which was less than their 2016 submitted data. Most orchestras, however, are reporting modest growth. The rise in arts council/government revenue funding is due to a few quite specific factors. First, it is worth noting that almost one in five orchestras who completed the survey receive no funding in this way at all. The methodology employed here for opera/ballet orchestras of including a proportion of their income means that if the orchestra budget is a larger proportion of the organisations' overall income between any specific years, it may look as though other income levels are rising even where the overall organisation is not in receipt of more funding. This methodology is a rough approximation only, and thus subject to issues of this type. Three orchestras reported significantly large increases in arts council/government revenue funding. These include an orchestra which was admitted to a national regular funding agreement for the first time. Four others reported smaller rises which were still above the average. However, funding for many orchestras stood still in this period.

The rise in arts council/government project funding is in part attributable to a single capital grant to one orchestra, of which there was not a similar kind of investment in the 2016 dataset.