ASSOCIATION OF BRITISH ORCHESTRAS

KEY FACTS: THE STATE OF THE UK'S ORCHESTRAS

April 2025 Report

SUMMARY

Key Facts: The State of the UK's Orchestras latest report provides an updated overview of key statistics for the orchestra sector, building on the data presented in 2019. The survey deliberately relates to the 2022/23 financial period, in order to capture the impacts of the unique set of challenges posed by the pandemic, and to provide a benchmark against which the sector's recovery can be measured in future surveys.

The data highlights a cultural success story, both domestically and internationally. Derived from a survey of Association of British Orchestras (ABO) members, the report illustrates how orchestras have navigated the challenges of a post-Covid world, capitalizing on international audiences while expanding their domestic presence through recordings and audio-visual streaming.

Orchestras have effectively utilised essential public investment to explore new markets and maintain—or in some cases, increase—the frequency and variety of their education and outreach performances. ABO members continue to play a crucial role in providing high-quality classical music experiences for hundreds of thousands of children, young people, and adults, both in concert halls and in communities across the UK.

For the first time, this year's report includes research on the actions, plans, and perspectives of orchestras regarding diversity and inclusion, as well as environmental policies. Future reports will track how these areas evolve in the coming years.

Most importantly, UK orchestras are successfully adapting to life after both Covid-19 and Brexit, innovating and finding new income sources to complement the public funding they receive.

At a glance...

641,636 attendances at concerts outside the UK, 374 concerts/ performances outside the UK, and 2,993 UK concerts and performances.

717,753 (3.8% increase on 2019) total attendance of children and young people aged at education and outreach performances/school concerts and at sessions for education, training or taking part.

67,646,963 domestic reach from recordings, broadcasts for film and TV, or audio-visual streaming and download.

Earned Income: **£94,625,258**

LIVE PERFORMANCES: NUMBER OF EVENTS AND ATTENDANCE

Over the past year, UK orchestras staged nearly 3,000 concerts and performances across the country, reaching a combined audience of more than 3.1 million people. However, a comparison with 2019 figures reveals a decline in concert frequency, indicating a step backward in performance activity.

The number of UK concerts, excluding opera and ballet, dropped significantly by 16.1% compared to 2019, with opera and ballet performances also falling by 17.3%.

Audience numbers saw a substantial reduction, with the average attendance per performance declining by 26.1%. This drop was fairly consistent across concert performances (26.1%) and opera and ballet (26.5%).

The reasons behind this downturn are not entirely clear, but multiple factors are likely at play. The pandemic led to widespread cancellations, and many orchestras, venues, and artists were struggling to return to their previous schedules. Competition from other entertainment sources, including streaming services, pop concerts, and theatre, may also be drawing audiences away. Economic challenges, such as rising living costs, have further limited disposable income, making it harder for people to afford concert tickets. At the same time, high operational costs for orchestras and venues make it increasingly difficult to sustain a full performance schedule.

Further research will help establish how orchestras have worked to restore performance levels to those seen in 2019, and develop their activities and reach, as the sector recovered from the effects of the pandemic in particular.

UK concerts and performances: **2,993** (-16.5% vs 2019)

Attendance at all UK concerts and performances: **3,141,365** (-26.1% vs 2019)

UK concerts: **2,016** (-16.1% vs 2019)

UK concert attendance: **1,921,303** (-26.1% vs 2019)

Performances as part of opera, ballet: **977** (-17.3% vs 2019)

Opera/ballet attendance: **1,220,062** (-26.5% vs 2019)

UK ORCHESTRAS IN THE COMMUNITY

Over the past year, UK orchestras engaged over 700,000 people of all ages through diverse activities. These included more than 1,000 performances and events designed to give children and young people unique opportunities to experience or participate in music. Nearly 300,000 young people attended these education and outreach events.

UK orchestras also delivered an impressive 33,119 sessions focused on education, training, and participation, with over 420,000 people getting involved. Notably, just three orchestras accounted for 23,416 of these sessions, driving the increase from 2019 figures.

1,043 Performances; Performances or events for, by, or with children and young people* (-19.3% vs 2019)

**In some cases youth orchestras can include those aged up to 25, please include those performances here*

717,753 (+3.8% vs 2019) total attendance of children and young people aged at education and outreach performances/ school concerts and at sessions for education, training or taking part.

297,636 total attendance of children and young people aged 0-19 at education and outreach performances/ school concerts in the UK

33,119 Sessions; Sessions for education, training & taking part (+186% vs 2019)

23,416 of these were carried out by 3 alone.

420,117 total attendance at sessions for education, training or taking part delivered in the UK.

OVERSEAS ACTIVITY: ORCHESTRAS IN THE WORLD

UK orchestras continue to make their mark on the global stage, despite a 9% decline in overseas performances compared to 2019.

Their touring schedule remains diverse, with latest data showing that British orchestras visited 34 countries and gave 374 performances. These concerts reached an audience of over 640,000 people outside the UK, reinforcing the international prominence and prestige of British orchestras.

Germany was the most frequent destination, hosting 38 visits from various orchestras. The Netherlands followed with 17 visits. European destinations dominated the list, with France, Spain, and Switzerland each welcoming UK orchestras 14 times, Austria 13 times, and Belgium 12.

As in 2019, the data for the year surveyed highlights the continued popularity of UK orchestras in the USA, with at least 15 visits. Beyond Europe and North America, notable tour destinations included South Korea, Japan, and the UAE, each receiving six visits, as well as single performances in Hong Kong and Taiwan.

205 visits to countries by UK orchestras

374 concerts/performances outside the UK (-9% from 2019)

641,636 attendances at concerts outside the UK

34 countries toured to

BEYOND THE CONCERT HALL: RECORDINGS

UK orchestras have significantly altered how they connect with audiences.

In the year surveyed, recordings for film, TV, and audio-visual streaming or downloads saw a 127% increase compared to 2019. However, these recordings often follow cyclical patterns influenced by various complex factors. Both free-to-access recordings and those requiring payment have declined by 31% and 36%, respectively.

This study estimates that recordings and broadcasts for film, TV, and streaming reached 67.6 million listeners in the UK. Internationally, UK orchestras are estimated to have reached 235.8 million listeners.

Audio only

351 recordings produced that would be available to be consumed for free (such as being on Spotify) (-31.4% vs 2019)

110 recordings produced that would only be available if someone paid for them (E.g., download and physical only) (-35.7% vs 2019)

Audio Visual

186 recordings produced that would be available as part of Audio-Visual consumption (E.g., Soundtrack for a movie, or for use on TV) (+126.8% vs 2019)

Broadcasts

67,646,963 estimated domestic reach in terms of recordings/broadcasts for film/TV or audio-visual streaming/download.

235,868,444 estimated international reach in terms of recordings/broadcasts for film/TV or audio-visual streaming/download.

FINANCES: SOURCES OF INCOME

UK orchestras have grown their total income by 45% compared to 2019. This rise is driven by a 37% increase in earned income, with ticket sales playing a key role, up 40% from 2019. Additionally, several orchestras have built on progress made between 2016 and 2019 in securing public funding, increasing their contributed income by a similar margin. This reflects a strategic and diversified approach to expanding revenue streams.

Orchestra Tax Relief has also played a crucial role in supporting both concert numbers and financial stability, contributing over £20 million to the total £215 million income. Without this relief, the overall income increase from 2019 drops to 31%.

2022/23 Total Income*:
215,685,618 (£215.7m)
(+45.2% vs 2019)

**Finance data is based on 48 orchestras who completed this section of the survey. This data does not, therefore, include the BBC orchestras who operate on a slightly different model.*

Earned Income:
£94,625,258 (£94.6m)
(+37.3% on 2019).

Ticket sales: **£34.9m**

Contract hire: **£11.1m**

UK tour: **£5.7m**
Non-UK tour: **£9.3m**
EU and non-UK tour: **£7.3m**

Other income: **£34.6m**

FINANCES: SOURCES OF INCOME (continued)

Government / Arts Council funding for revenues and projects has risen 45% since 2019. This increase may be due largely to Arts Council / Government emergency funding received to support orchestras to navigate the continuing effects of the pandemic. The split between revenue and project funding remains similar, with revenue funding making up 98% of the total. This increase has been primarily driven by a 53% rise in revenue funding.

UK orchestras have grown their contributed income by 31%, continuing the steady 30% rise seen between 2016 and 2019. Most of this comes from individual giving, which accounts for £15.1 million of the £33.4 million total.

The survey also highlights that UK orchestras are maintaining inward investment from international sponsorship, trusts, and foundations.

Meanwhile, local authority funding has continued its decline since 2016, dropping another 36% from 2019 levels. Compared to 2019, only one orchestra received any remaining EU legacy funding.

BBC orchestras, not included in these figures, have a total budget of £18 million, with £14 million from the licence fee.

Total Arts Council/Gov funding: **£52.7m**
- Arts Council/Gov revenue funding: **£51.5m**
- Arts Council/Gov project funding: **£1.2m**

Contributed income: **£33.4m** (individual giving as biggest contributor at £15.1m)
- UK sponsors/donors: **£24.1m**
- Overseas sponsors/donors: **£1.3m**
- UK Trusts and Foundations: **£11.4m**
- Overseas trusts and foundations: **£536k**

Local Authority funding: **£3.9m**

Orchestra Tax Relief: **£21.6m**

STAFF AND MUSICIANS: CREATING JOBS

Orchestras continue to provide substantial employment for musicians, with 2,334 holding member status with freelance orchestras or permanent contracts, reflecting a 9% increase from 2019. However, there has been a notable decline in musicians employed as extra or deputy players, dropping from 11,917 in 2019 to 9,314 in the year surveyed—a 21.8% decrease.

Among the permanent or member-status musicians, 236 are non-UK EU nationals, making up 10.1% of the total, a 2% increase since 2019. This suggests that the expected Brexit effects may not have fully materialised yet, or that its impact on non-UK EU employment is unfolding differently than anticipated. Further research would be needed for clarity.

In addition to musicians, ABO members employ 1,598 non-musician staff on long-term contracts or as freelancers, reinforcing the critical role UK orchestras play as major employers within the sector.

949 Musicians employed on permanent or long-term contracts (-15% vs 2019).

Of which **87** (+26% vs 2019) were EU nationals and 27 non-EU (excluding UK citizens).

1,385 holding member status of freelance orchestras (+34.6% vs 2019).

Of which **149** were EU nationals and 29 non-EU (excluding UK citizens).

9,314 Musicians engaged as extra or deputy players. (-21.8% vs 2019).

1,598 non-musician staff employed on either long term contracts or as freelance staff. Of which **40** were EU nationals.

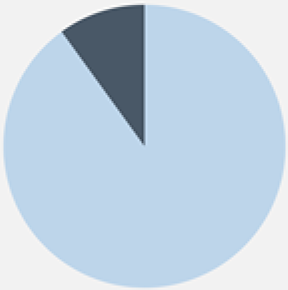
DIVERSITY AND INCLUSION

Among the 50 orchestras that responded to questions regarding diversity and inclusion, just 7 reported not having a Equity, Diversity and Inclusion (EDI) policy or action plan in place.

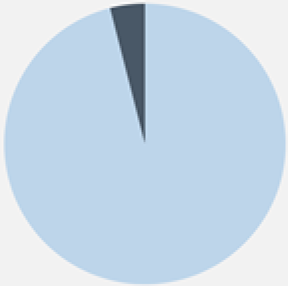
Orchestras are making notable strides in this area. 90% are working to diversify their programming through initiatives such as composer and young artist schemes. Additionally, 96% are actively seeking ways to increase opportunities for young people, especially from underrepresented communities, to engage with music. An impressive 88% have collaborated with local community groups to reach more diverse audiences.

While progress is being made, the ABO recognises that there is more to be done. 10% of orchestras expressed a need for support in marketing to diverse groups to encourage greater attendance at performances. Moreover, 29% of orchestras believe they are unable to improve the accessibility of their venues, while 41% have made advancements in accessibility, with 22% planning improvements soon.

As this is the first report to include questions on diversity and inclusion, it is not possible to compare these findings to previous years.



90% of orchestras are diversifying programming including composers schemes and young artist schemes



96% are actively finding ways to increase opportunities for young people to get involved in music

ENVIRONMENTAL POLICY

Of the 49 orchestras that answered questions about their environmental impact, just 11 indicated they do not have an environmental policy or action plan. The majority, however, are taking significant steps toward addressing environmental concerns.

On average, 74% of the respondents are actively working to minimise the environmental impact of their performances. The actions they have taken vary in both nature and scale, encompassing a range of initiatives, including but not limited to:

1. Day to day measures:

- No plastic refreshments and a focus on sustainable riders.
- Efficiency conscious use of resources and energy e.g. rechargeable music stand lights.
- Encouraged use of E-Tickets.
- Responsible procurement policies and waste control plans.
- Carbon literacy training for musicians and non-musician staff.

2. Planning with the environment in mind:

- Consolidate tour transportation and the elimination of single day tours.
- Walkable accommodation booked for domestic and abroad concerts/tours.
- Car shares encouraged for freelance and contracted staff.

3. Infrastructure for a greener orchestral sector:

- Upgrades to building energy efficiency carried out by several groups.
- Solar panels installed on the home venue of one orchestra.
- Wind turbine installation by one orchestra.

On average, 22% of respondents are not yet implementing these measures but plan to do so soon, which is encouraging. However, 7% of orchestras expressed a desire to expand their efforts but indicated they require support to make progress. This number rises to 11% when it comes to improving the environmental impact of audience travel to their events.

Comparison to previous years cannot be made as this is the first report of this nature to include questions on environmental impact.

LOOKING AHEAD

As we look to the future of British orchestras, the sector demonstrates resilience and innovation in a rapidly changing cultural and economic landscape. Despite challenges such as the post-Covid recovery and Brexit, orchestras have successfully adapted by reaching broader audiences both nationally and internationally, expanding their digital presence, and diversifying income streams. The continued investment in education, outreach, and community engagement remains at the heart of their mission, providing opportunities for new generations to experience the power of live music.

While significant progress has been made in areas such as diversity, inclusion, and environmental sustainability, there is more to be done. The orchestral sector recognises the importance of addressing these challenges, and future reports will track how initiatives in these fields evolve over time.

With continued public support and a commitment to innovation, British orchestras are well-positioned to thrive, enriching cultural life and continuing to inspire audiences across the globe for years to come.

A TECHNICAL NOTE

Between January and March 2024, the ABO conducted a survey of the UK's professional orchestras to gather data on their activities, audiences, financials, and musicians. The survey relates to the season/financial year 1 April 2022 - 31 March 2023 (or closest equivalent 12-month period). A total of 53 out of 85 member orchestras responded – up from 44 orchestras who took part in 2019. The 2025 report cohort is similar in make up to the 2019 responses. While % comparisons have been made between cohorts the impact of the pandemic means that data might not be directly comparable.

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.

For more information, or to join our mailing list, please contact us at: Telephone: 020 7759 1060 Email: info@abo.org.uk www.abo.org.uk
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