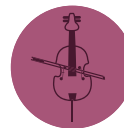
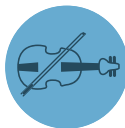
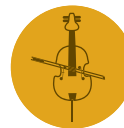
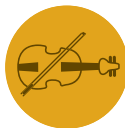


ABO

ASSOCIATION OF BRITISH ORCHESTRAS

THE STATE OF BRITAIN'S ORCHESTRAS IN 2016



SUMMARY

This survey provides an update on key statistics for the orchestra sector in 2016. The orchestras surveyed represent 84% of the Association of British Orchestra's (ABO's) 61 members.

The survey was last carried out in 2013, and over the intervening period orchestras have risen to the challenges presented by reduced funding and a subdued economy. The latest survey shows how orchestras have innovated to engage more children and young people, and reach bigger audiences in more places - and they should be proud of these successes.

However, the statistics mask a difficult financial reality. Increases in audiences and engagement have been fuelled by initiatives such as discounted ticketing, free concerts and fixed fee performances at open air events, so bigger audiences have not brought in more money. If anything, it's the reverse, increasing losses in a tough environment.

This situation has left orchestras suffering a double blow of reductions in earned income, as well as cuts in national and local government funding. The message is simple. Orchestras cannot continue doing 'more for less' without incurring significant damage to their bottom line. The solution has to be increased public funding to support their core costs.

Key numbers from the 2016 survey results are:

4.83m

4.83m attendances at all UK concerts & performances (+3% vs. 2013*).

4,137

4,137 UK concerts & performances (+7% vs. 2013*).

c.900k

Reached almost 900,000 children & young people via performances & education sessions.

42

Toured to 42 countries, performing 416 concerts.

2,411

Employed 2,411 permanent, long-term or member status musicians, of which almost 20% are EU nationals.

£117.5m

£117.5m total income (total income -5% & local authority funding -11% vs. 2013*).

SURVEY EXPLANATORY NOTE

The Association of British Orchestras surveyed Britain's professional orchestras about their activities, audiences, income and musicians, between August and October 2016.

Responses were received from 51 orchestras: 84% of those from whom responses were requested.

Respondents provided data for the season/financial year 2015-2016 or the closest equivalent 12-month period.

Comparisons are made in this report with the 2013 'key facts' survey (covering 2012-2013) for a core sample of 38 orchestras for non-finance data, and 31 orchestras for finance data¹, that completed the survey in both years.

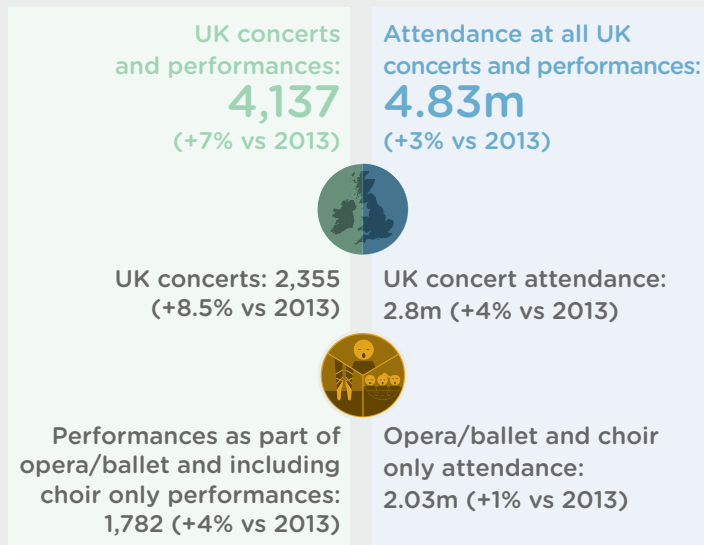
As some of the orchestras that provided data in 2016 differ from those that responded in 2013, the total numbers in this report should be viewed as representative rather than firm numbers. The percentages shown in brackets for Live Performances and Sources of Income reflect changes in the comparison groups over the three-year period, and are not percentage changes in the total numbers between 2013 and 2016.

¹Comparative financial data has not been adjusted for inflation.

LIVE PERFORMANCES

British orchestras are delivering more performances and reaching more people than in previous years of the survey.

In 2016 they gave 80 concerts or performances every week to over 90,000 people. The total number of concerts and performances in 2016 was 4,137 with total attendances of 4.83m. In 2013 these numbers were 3,536 and 4.52m. In the comparison group, the total number of concerts and performances has increased by 7% and audiences have increased by 3%.

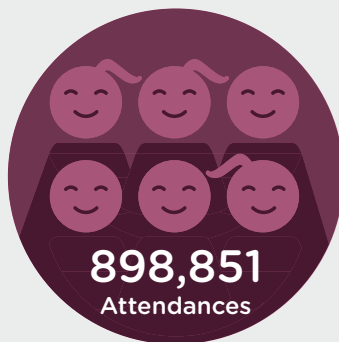


BRITISH ORCHESTRAS IN THE COMMUNITY

British orchestras are continuing to deliver an enormous range of activities to entertain and educate young minds. They run substantial programmes for children and young people across the year, and in 2016 reached almost 900,000 participants. This was a 35% increase on the total outreach by orchestras in 2013.



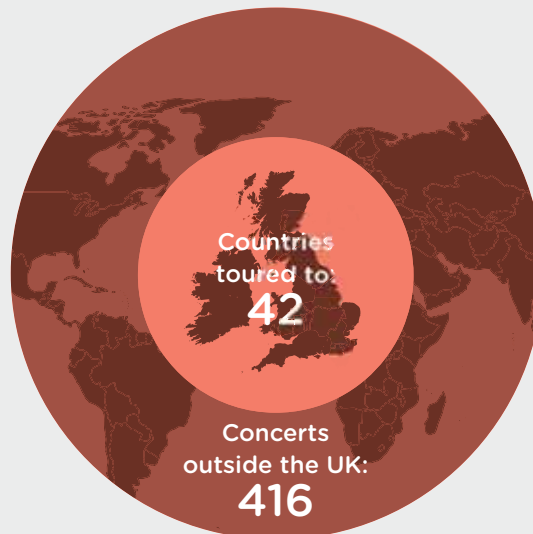
Performances and education sessions for, by or with children and young people:
13,899



Attendance of children and young people at performances and education sessions:
898,851

BRITISH ORCHESTRAS IN THE WORLD

British orchestras are performing a strong public relations role for the UK. They showcase the very best of British culture and musical expertise to thousands of people around the world on overseas tours. In 2016 orchestras visited a total of 42 countries globally, compared with 35 countries in 2013. Europe is the most toured-to continent, with orchestras reporting 96 visits to 26 different European countries. France, Germany, Italy, Spain and Austria are the most common touring destinations across orchestras.



BEYOND THE CONCERT HALL

Audio and video recordings are now well established ways for orchestras to extend their audience reach beyond traditional venues. The total number of recordings for CD or paid for audio download in 2016 was 155, which is similar to the 151 recordings produced in 2013. In the comparison group, there has been a small decrease in the number of recordings across all categories.



Recordings for CD or paid-for audio download: 155



Recordings for radio/free audio streaming or download: 438



Recordings for film/TV or audio-visual streaming/download (live, recorded or on-demand): 119

CREATING JOBS

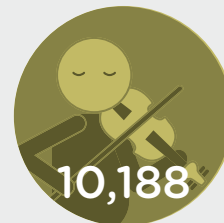
Orchestras continue to employ significant numbers of musicians, as well as management, and other staff and businesses that help to deliver concerts and recordings. In 2016, there were 2,411 musicians employed in full-time or regular positions. In 2013 the total number for the same categories was 2,013². EU nationals are a significant minority, representing almost 20% of the permanent, long-term or member status employees.



Musicians employed on permanent or long-term contracts: 1,163, of which 126 were EU nationals (excluding UK citizens).



Musicians holding member status of freelance orchestras: 1,248, of which 334 were EU nationals (excluding UK citizens).



Musicians engaged as extra or deputy players: 10,188

² As per the Survey Explanatory Note, some of the orchestras in 2016 differ from 2013, and this accounts for the increase in total numbers in 2016.

SOURCES OF INCOME

Orchestras are operating in a constrained funding environment. Total income in 2016 is £117.5m and earned income was £56m³. In 2013, the equivalent numbers were total income of £140m and earned income of £66.6m. In the comparison group, total income has fallen by 5%, with earned income, contributed income and public funding showing decreases. The most significant change is in public funding, with a 7% drop in Arts Council and government funding and a 11% drop in local authority funding. The proportions of total income are in-line with 2013 and earned income continues to represent nearly half of orchestras funding.



³ Data supplied by 41 orchestras in this year's survey. This section excludes data from BBC orchestras.





£20.1m

Contributed income⁴:
£20.1m
(-3% vs 2013)



£6.6m

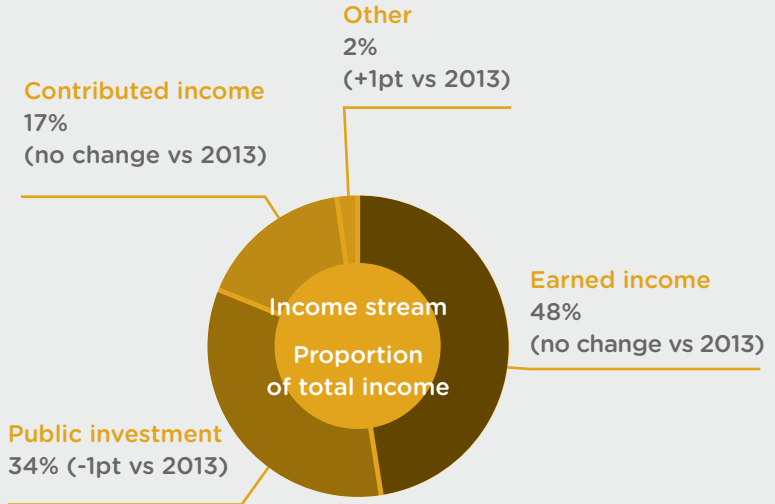
Local Authority funding:
£6.6m
(-11% vs 2013)

Arts Council / government funding:
£32.7m (-7% vs 2013)

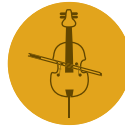
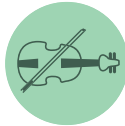
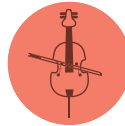
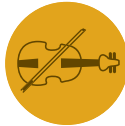
Project
Funding
£2.4m



Revenue
Funding
£30.3m



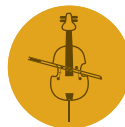
⁴ Note that in 2013 contributed income showed a significant boost, due to capital campaigns and the Catalyst Endowments scheme, which has since ended.



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.