TRENDS IN CLASSICAL MUSIC INTERNATIONALLY, WITH SPECIAL REFERENCE TO ORCHESTRAS

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The classical music sector in Australia, and within it, the symphony orchestra sector, have been remarkably buoyant this decade. Notwithstanding the challenges of the global financial crisis, for the most part Australian orchestras have weathered the storm comparatively well. Nonetheless, within this context, concerns have been expressed that Australian orchestras might face an uncertain future and encounter the adverse circumstances that have confronted a number of orchestras internationally and suffer similar fates to those experienced particularly in the United States.

To that end, the Music Council of Australia has looked at the international landscape to the extent possible and within the constraints of availability or otherwise of information that is sufficiently comparable in order to ascertain what hurdles might be coming Australia's way. Clearly symphony orchestras are part of, not the entirety of, the classical music sector. However, recognizing that they are the economic backbone of the sector, they warrant particular attention and are the main focus of this paper.

Looking at the international experience, what emerges is the extent to which local circumstances vary from country to country and region to region. The history of orchestras, the manner in which their funding models have developed, the history and demographics of the countries in which they reside, along with local circumstances more often than not makes looking to international comparisons less important than paying attention to the local environment. That being said, certain factors are common across orchestras.

The three most important themes are obvious and well-known: firstly that orchestras are unable to rely on box office receipts alone for survival; secondly, orchestras are almost uniquely unable to achieve the kinds of productivity dividends that accrue to most organizations through utilization, in particular, of technological developments and, thirdly, the fixed (and rising) costs tied up in labour represent an unusually high proportion of expenditure by reference to other businesses.

Given that most concern over the future of symphony orchestras has arisen from the plight of many in America, this paper looks first to the United States.

UNITED STATES OF AMERICA

The state of orchestras between 1987-88 and 2003-2004

Robert J. Flanagan's 2008 *Report to the Mellon Foundation, The Economic Environment of American Symphony Orchestras* opened as follows:

> The genesis of this project could have been the following quote:
>
> > "In spite of their vitality, growth in numbers, and the volume of their attendance,

> all symphony orchestras are facing serious financial problems and their future rests on an unstable basis. Receipts from tickets have never been enough to balance the costs…. All, therefore, have had to resort to various kinds of deficit financing…. Endowments are becoming more difficult to build up and the income therefrom has been found uncertain when most needed in depressions. Annual maintenance fund drives are finding fewer large donors and are reaching out for more contributors of small sums. Subsidies have been little tried in this country and involve many problems."

> As it happens, the quote is from a book published in 1940—*America's Symphony Orchestras* by Margaret Grant and Herman S. Hettinger (pp. 21-22).

Flanagan's study included data from every orchestra that ranked as one of the 50 largest American symphonies for at least two years during the 1987-88 to 2003-04 concert seasons, a total of 63 orchestras. During that time 46 orchestras ran deficits on average – excluding their money from endowments – with only 17 running surpluses.

Seemingly, the more things change, the more they stay the same. As Flanagan observes, 'Sixty-eight years later, the durability of the economic problems of symphony orchestras worries pessimists, while the continued survival of most major symphonies may encourage complacency among optimists, who conclude that solutions to chronic operating deficits will always emerge.' However, over that period the proportion of orchestral expenditure covered by performance revenue continued to decline. Flanagan's survey of American orchestras also found several trends:

- although recessions exacerbate their woes bringing declining attendances and falls in philanthropic support, many symphonies face financial difficulties in good times
- in the 20 years to 2004, traditional sources of non-performance income often failed to achieve overall financial balance for orchestras
- performance revenues fall short of performance expenses by ever-increasing amounts
- attendance per concert is declining for most concerts, despite steady increases in the proportion of the population with a college education (the demographic most likely to attend concerts)
- as orchestras increase the number and variety of concerts, 'total annual concert attendance increased somewhat but attendance per concert declined sharply' (page 72)
- increasing patron preference for single ticket purchases over season subscription tickets
- although a small percentage of overall costs, rising expenditure on marketing and fundraising
- sensitivity of private donations to general economic circumstances
- the need to live with the luck of location – for instance, a company's policies will not change the real income or the size of an area's population
- marketing can increase attendance but is subject to diminishing returns
- increases in fundraising expenditure can increase donations but returns are largest for the smallest orchestras netting $1.96 for every $1 spent on fundraising, whereas

similar efforts seem likely to not pay for themselves for larger orchestras where the return can be as little as 51 cents for every $1 spent

- a wide variation in returns on endowments with no orchestras having sufficient endowment 'to offset performance income gaps at prudent rates of endowment draw' (page 74)
- huge variety in policies on revenue structure and expenses, patterns of contributed support, return on investment and endowment draw
- orchestras do not have the capacity to achieve productivity gains such as those that are possible in many other industries as technology cannot make musicians more productive
- salaries of musicians increased more rapidly than those of most other American workers in the late 20th century but increasing price tickets did not compensate for wage increases, more often reducing attendances.

Importantly, Flanagan finds there is no single solution to the economic challenges faced by individual symphony orchestras.

Public Participation in the Arts – United States

Last year the National Endowment for the Arts released its *2008 Survey of Public Participation in the Arts* (2008 SPAA) together with *Participation 2008: Highlights from a National Survey* (Highlights) The former focuses on 2008 and draws some comparisons with 2002 while the latter provides trend data from 1982. Classical music is defined as symphony, chamber or choral music performances. Conducted in May 2008, the survey covered participation in the arts during the previous 12 months.

The 2008 survey was conducted by the United States Bureau of Census, as were previous surveys conducted in 2002, 1992 and 1982. Although conducted ahead of the global financial crisis, the United States was in recession for six of the twelve months covered by the 2008 survey, in recession for the first three months covered by the 2002 survey, was not in recession during the period covered by the 1992 survey (the previous recession having ended in March 1991) and was in recession for the entire twelve months covered by the 1982 survey.

<u>Key findings:</u>

Attendance (2008 SPAA, page 24)

- 9.3 per cent of adults (21 million) attended a performance in 2008, down from 12 per cent in 2002 and continuing a pattern of decline over the previous 26 years, but the average number of attendances dropped only slightly, from 3.1 to 2.9.
- In 2002, those aged 45 to 64 were more likely to attend a classical music performance than those in other age groups. By 2008, the audience had shifted to older people with 12 per cent aged 65 to 74 years attending a classical music performance, compared with 10 per cent aged 45 to 54 and 7 per cent under 35.
- The largest decline was among those aged 55 to 64 (15.6 per cent in 2002 versus 11.6 per cent in 2008).

- 27 per cent of people with a graduate school education attended at least one classical music performance in 2008, down from more than one third of these adults in 2002.
- Attendance declined for each education, income and racial/ethnic group. More women attend classical music performances, although the gap narrowed in 2008. Males averaged slightly more performances in 2008 than females.

Percentage of US Adult Population Attending Arts Performances: 1982-2008

	1982	1992	2002	2008
Jazz	9.6%	10.6%	10.8%	7.8%
Classical music	**13.0%**	**12.5%**	**11.6%**	**9.3%**
Opera	3.0%	3.3%	3.2%	2.1%
Musical plays	18.6%	17.4%	17.1%	16.7%
Non-musical plays	11.9%	13.5%	12.3%	9.4%
Ballet	4.2%	4.7%	3.9%	2.9%

Source: *Participation 2008: Highlights from a National Survey*, page 3

Recorded media (2008 SPAA, pages 35-36)

- Five per cent of adults watched or listened to opera through recorded or broadcast media. The media participation rate for jazz and Latin music is substantially higher – 15 per cent of all adults, for each – and higher again for classical music at 18 per cent with audiences ranging from 11 million for opera to 40 million for classical music. Participation through media is more than double the number attending live performances.
- More U.S. adults watched or listened to classical music through electronic media (18 per cent of adults) than any other art form studied in the 2008 SPPA. Although media-related questions differed in 2002, participation in classical music via media appears to be declining. Women constitute more of the classical music audience than men. Nearly 40 per cent are aged 45 to 64 years old. 39 per cent of those with a graduate education watched or listened to classical music through media, compared with less than 10 per cent of respondents who had completed high school but not attended college.

Personal participation (2008 SPAA, page 43)

- The largest increases in personal participation were in performing classical music and creating photography or movies.

Performing classical music (2008 SPAA, page 45)

- Personal performance of classical music declined sharply from 1992 to 2002, but appeared to have recovered by 2008. The proportion of all adults reporting they had performed classical music at least once in the past 12 months increased from 1.8 per cent in 2002 to 3.1 per cent in 2008 with 7 million adults performing classical music. Personal performance of classical music is highly correlated with educational level, more so than other performing arts. Adults with at least a college degree are six times more likely to perform classical music compared with high school graduates. However, highly educated people are only slightly more likely to sing in a choir, sing opera, or act in a play than those with a high school education

Music preferences (2008 SPAA, pages 57-58)

- Classical/chamber, jazz, blues/R&B and hymns/gospel music are each 'liked' by about one-quarter of U.S. adults. 15 per cent reported liking folk music. Both the 2002 and 2008 surveys saw a decline in the percentage of adults saying they liked listening to particular forms of music. The only increase from 2002 to 2008 occurred among those who like listening to Broadway musicals/show tunes (from 17 per cent to 20 per cent in 2008).

Regional variations (2008 SPAA, page 67)

- Adult participation in the arts through attendance, media, learning, and performance or creation varies by geographical region. Residents of New England and the Pacific region reported relatively high rates of attendance for classical music and musical theater performances in addition to relatively high rates of art museum and gallery visits.
- New England and Pacific region residents had consistently high attendance rates for 'benchmark' arts activities with about 42 per cent reporting that they went to a jazz, classical music, opera, musical or non-musical play, ballet performance, or art museum/gallery in the 12 months ending in May 2008 (these activities constitute the 'benchmark' arts activities tracked since 1982 in the SPPA). Attendance at benchmark arts activities by residents of the East South Central and the West South Central regions were generally below rates for other parts of the country.

Demographic profile and attendance patterns of classical music performance attendees in 2008 (2008 SPAA, page 79)

- Nearly 20 per cent were 65 or older – high relative to other performing arts.
- 56 per cent were female.
- More adults watched or listened to classical music through media (about 18 per cent, or 40 million) than to any other art form studied in the 2008 SPPA. More than a quarter of adults said they like listening to classical music.
- Those with higher levels of education (at least some college education) were more likely to listen to classical music or attend classical music performances. Nearly 60 per cent had a college or graduate degree. Three per cent of adults with a high school degree attended a classical music performance, compared with 17 per cent with a college degree and 27 per cent with a graduate degree. Those with college or graduate degrees were three times more likely than high school graduates to watch or listen to classical music via media.
- About 23 per cent of people in households earning at least $150,000 attended a classical music concert, a higher proportion than among other income groups.
- Adults attending a ballet or opera performance were much more likely to attend a classical music performance than adults attending other benchmark activities.
- One in five who said they volunteer in their free time attended a classical music performance.

- Almost 24 per cent of those who have taken a music appreciation class in their lifetime attended a classical music performance. About 18 per cent of those taking lessons to play an instrument attended a 2008 performance.

The Glass Half Full or Half Empty

For every person predicting the death of classical music in the US there is another arguing what is happening is change not demise. In 2006, ahead of the global financial crisis, Allan Kozinn argued in the *New York Times* that 'rumors of classical music's demise are dead wrong' (2006: online). Noting that 17 orchestras had closed in the previous 20 years, that music education had virtually disappeared from public schools, that the audience was graying, ticket prices rising and record sales plummeting, Kozinn contended that 'there is immensely more classical music on offer now, both in concerts and on recordings than there was in what nostalgists think of as the golden era of classics in America'. While the output of the major labels pales by comparison with the output between 1950 and 1975, Kozinn argues that rather than looking to the majors, the present and the future lie with labels like Bridge, Oxingale, Cantaloupe and Naxos along with 'Internet deep-catalog shops like arkivmusic.com' offering 'virtually any CD in print, something no physical store can do today'. Of the billion tracks sold on Apple's iTunes in its first three years, classical music accounted for 12 per cent and both 'Sony-BMG and Universal say that as their download sales have increased, CD sales have remained steady, suggesting that downloaders are a new market, not simply the same consumers switching formats'.

In 2006, the American Symphony Orchestra League put the number of orchestras in the United States at 1,800 (350 of them professional) giving approximately 36,000 concerts a year, 30 per cent more than in 1994. In 2003-4, orchestras reported an 8 per cent increase in operating revenues against a 7 per cent increase in expenses, with deficits dropping to 1.1 per cent from 2.7 per cent of their annual budgets from the previous season. All of which indicates that those able to ride out the global financial crisis may return to a level of stability. Kozinn also points to the success of early music and new music as being growth drivers and drawing younger than usual audiences to symphony performances.

In 2008, Leon Botstein argued in *The Wall Street Journal* that 'the heralding of the demise of classical music is based on flimsy evidence', citing the exponential increase in the number of concert venues, summer festivals, performing ensembles and overall performances in classical music and opera over the last four decades. He continued:

> There are currently nearly 400 professional orchestras in America, according to the League of American Orchestras, while 30 years ago there were 203. There are up to 500 youth orchestras, up from 63 in 1990. The number of orchestra concerts performed annually in the U.S. has risen 24% in the past decade, to 37,000. Ticket-sale income from orchestra performances grew almost 18%, to $608 million, between the 2004-'05 and 2005-'06 seasons.

Botstein argues that much of the current concern about classical music 'stems from another false assumption: that classical music was once profitable, but is now failing financially'.

> This distorted expectation is rooted in the peculiar experience of the last decades of the 19th century, after the rapid extension of literacy in Europe and America. Before recording became commercially viable in 1902, when the Columbia and Victor companies joined forces and issued discs, sales of instruments (particularly the piano), concert tickets and sheet music were thriving businesses. With the advent of recorded music – first the player piano, then the radio, the 78 rpm record, the long-playing record and the digital CD – novel, albeit brief, opportunities for making money followed. These circumstances do not represent the broader historical norm. Classical music never held the promise that it could enlist a mass audience. From its birth as a secular and church-based art form, classical music has depended on patronage and philanthropy, not on income from sales either at the box office or in record stores.

In any event, notwithstanding the dire straits in which some orchestras have found themselves in recent years – see below – and contrary to much speculation, as yet no large American orchestra has folded, though concerns remain about Detroit, Philadelphia and Cleveland. Further, where smaller orchestras have folded they have mostly been replaced by another, usually in the same city.

CANADA

Attendance at Arts Performances, Museums and Art Galleries in Canada and the Provinces, prepared in 2003, examines national and provincial trends in Canadian arts attendance in the 1990s. Based on Statistics Canada's General Social Survey data from 1992 and 1998 it remains the most current broad-based estimate of arts attendance in Canada Unfortunately, this data does not match the periods covered by the National Endowment for the Arts' study for the United States nor that released this year by the Australia Council. However, it is nonetheless worth noting the trends in Canada.

The report found that 9.1 million Canadians 15 and older, or 37.6 per cent of Canadians in this age range, attended a live, professional performing arts event in 1998 with theatre the most popular, followed by popular music, classical music and dance. Reaching Canadians who speak languages other than English or French remains a significant challenge.

The attendance rate at performing arts events decreased during the 1990s, but given population growth, about 100,000 more Canadians attended a performance in 1998 than in 1992.

Because provincial attendance rates vary significantly, the report concludes that there appear to be performing arts 'have' and 'have-not' provinces. Performing arts preferences vary significantly between the provinces resulting in different provinces having the highest attendance rates at theatre, classical music, pop music and dance performances.

Key findings (page 5)

- Attendance rates for the performing arts dropped from 42.4 per cent to 37.6 per cent between 1992 and 1998.
- Theatre attracted 24.3 per cent in 1992 dropping to 21.7 per cent in 1998.
- Pop music concerts reached 24.0 per cent of Canadians in 1992 but dropped to 21.3 per cent in 1998.
- Conversely, the percentage attending at least one symphony performance increased slightly from 8.4 per cent to 9.0 per cent.
- Choral music experienced a sharp increase from 3.1 per cent to 7.2 per cent.
- Opera attendance rates decreased from 4.4 per cent to 3.2 per cent.
- Combining opera, choral music and symphony performances into a single ‘classical music’ category shows an increase in attendance, reaching 12.4 per cent of Canadians in 1992 and 13.7 per cent in 1998.
- Dance increased from 5.0 per cent to 7.4 per cent.

Educational attainment and age (pages 6-7)

- Attendance rates decreased for every education group.
- Attendance rates for those with at least a bachelor’s degree experienced the biggest drop with rates falling from 67.5 per cent in 1992 to 55.7 per cent in 1998.
- For those with less than a high school education, the change was only two per cent, from 25.3 per cent in 1992 to 23.3 per cent in 1998.
- Attendance rates decreased fairly equally for all age groups under 60 but increased slightly for those over 60: down 6.4 per cent for 15-29 year olds, 6.1 per cent for 30 to 44 year olds, 6.8 per cent for 45 to 50 year olds and up for those over 60 by 1.6 per cent.

Provincial variations in attendance for all performing arts (page 9)

- Quebec and British Columbia had classical music (symphonic, operatic and choral performances) attendance rates at 17.6 per cent and 17.3 per cent respectively, well above all other provinces. The other five jurisdictions had attendance rates below the national average of 13.7 per cent with Alberta at 12.7 per cent, Ontario at 11.7 per cent, Manitoba at 10.5 per cent, the Atlantic provinces at 9.6 per cent and Saskatchewan at 7.2 per cent.

SCANNING NORTH AMERICAN ORCHESTRAS

> I’m sure you realize that the last several years have been increasingly difficult for many nonprofit arts organizations. Almost weekly, we hear of an orchestra somewhere having severe financial problems, with some reaching the point of ceasing operations. In light of the many great cultural benefits that flow from broad public access to the world’s great art music, it’s clear that we, as a society, are facing a growing problem, and we need to address it sooner, rather than later.

Durwood Felton, President **Richmond Philharmonic Orchestra**
Online letter to patrons
37th Concert Season 2009-2010

For the first time in its 75 year history, the **Charleston Symphony Orchestra** suspended its operations at the end of March this year, a decision triggered by acute financial difficulties arising from a significant drop in fundraising. A victim of the subprime induced crisis in the US, its next season is also in doubt (Parker 29 March 2010: online). The pay cuts agreed to by orchestral musicians last year (Players Association of CSO: 2009 online) proved insufficient to weather the financial crisis.

The global financial crisis hit the **Passadena Symphony** early. In October 2008 its November 2008 rehearsals and concerts were cancelled (Violinist.com 12 October 2008: online).

Notwithstanding the engagement of music director, Leonard Slatkin in 2008, in 2009 the **Detroit Symphony Orchestra** posted a budget deficit in 2009 of \$3.7 million against an annual budget of \$29 million, attributed to a drop of \$1.6 million in corporate gifts, a drop in earned revenue of \$1.2 million which included an \$837,000 fall in ticket sales and a drop in investment income from its endowment of \$350,000 'which took a beating in the stock market'. The shortfall in 2008 had been \$500,000. It had to borrow \$3.2 million from its endowment fund to pay for operations and the slump in the stock market combined with the borrowing for operational purposes reduced the fund from \$54.6 million in 2008 to \$37.6 million in 2009 (Nunez 11 December 2009: online).

Ohio's **Warren Philharmonic Orchestra** cancelled the first concert of its 2009-2010 season, cut the salaries of musicians and staff by ten per cent and moved other concerts to smaller venues. The president of the orchestra's board observed: 'Primarily, large donations from banks and foundations are what really keeps the orchestra together …With the economy, they've had to make major cuts … It seems when the economy goes down, the arts is the first group to get hit' (Gray 25 September 2009: online).

Out of money and failing to reach a new musician's agreement, after 57 years the **Columbus Symphony Orchestra** shut down in June 2008 (Stoehr 9 May 2008: online).

In May 2009, the **Chicago Symphony Orchestra** Association acted to address the recessionary impact of the global financial crisis. It began the 2008-2009 season in a healthy financial position. A subscription campaign exceeded the previous year's sales by two per cent, its main series subscription rate exceeded 87 per cent for the second year in a row. Subscriber single ticket add-on sales exceeded the previous season's by 76 per cent. It ended the 2007-2008 financial year with a modest surplus and a 5.2 per cent increase in its Annual Fund giving. However, following the September 2008 crash ticket sales and donations slowed. The CSO hopes changes implemented last year will secure the orchestra's future and see it ride out the recession. Changes include operational restructuring, cost savings in areas like travel, a new agreement with musicians including a reduction in negotiated rates of 2.5 per cent for two years to 2011 together with an additional rehearsal and performance, a hiring freeze that includes not filling existing vacancies, reductions in fees for guest artists and conductors, deferment of large scale programming initiatives and a reduction in capital spending of 25 per cent for the 2009 season and of 50 per cent for the 2010 season (CSOA press release 16 May 2009 cited by Miller: online at stltoday.com).

It is clear that without the goodwill of the musicians things would look very different:

> "We are proud that our members rose to the occasion and agreed to contract revisions that will save $1.8 million at this critical moment in the Orchestra's history," Gary Matts, president of the Chicago Federation of Musicians. "The CSO Musicians voluntarily took these steps to help ensure that the CSO Association will maintain a viable financial position during these troubled economic times and for the longer term."

'For the first time in memory', the **Vancouver Symphony Orchestra** cancelled two concerts in April this year citing a severe budget shortfall. The VSO press release announcing the cancellations, stated: 'While attendance is the highest in the history of the orchestra, ticket sales are only a small percentage of our total revenue' (Bash 24 March 2010: online).

UNITED KINGDOM

Unfortunately, data available from the United Kingdom is not in a form that makes for easy comparison with the data from jurisdictions such as the United States, Australia and Canada. For example, the Art Council's 2008 publication *Arts audiences: insight* divides the population into demographic types but does not provide statistical breakdowns of audiences within either a particular demographic type or as a percentage of total population. The Department of Culture, Media and Sports's 2007 *Culture on Demand: Ways to engage a broader audience* again focuses on the patterns evident among those with disabilities, from lower socio-economic groups and the 'Black and Minority Ethnic' populations. *Knowing the Score*, released in July 2000 by Emc Arts and Institute for Cultural Policy & Practice included statistics on the UK orchestral sector but is out of print and not available online.

According to the Association of British Orchestras, the UK has seven so-called 'contract' orchestras – employing players on fulltime salaries (Bournemouth, City of Birmingham, The Hallé, Northern Sinfonia, Royal Liverpool, Royal Scottish National and Ulster) all of which receive annual funding from their respective Arts Councils (England, Northern Ireland, Scotland, Wales). The Brighton Philharmonic, Guildford, London Philharmonic, London Symphony, Milton Keynes City, Philharmonia and Royal Philharmonic Orchestras are so-called 'freelance' orchestras which have 'fixed membership, but are essentially freelance orchestras', four of which receive annual Arts Council funding. Thirteen companies have their own orchestras of which six employ full time musicians on contract and ten of which receive annual Arts Council funding. The BBC has five orchestras of its own, with musicians all on full time salaries. There are a large number of chamber orchestras across the UK, six of which are in receipt of annual Arts Council funding and others of which may be eligible for 'project' or 'flexible' funding from their Arts Councils with some receiving funding from local authorities.

The Nugent Report observed in 1999, 'the United Kingdom model is best described as a government model, with more revenue coming from government than from any other single source', while 'the Australian model is best classified as a box office led model' with Australian performing arts companies 'showing the highest per cent of revenue from box office of any of their international peer companies' and 'the United States model could be called the private sector model, with the combination of both performance and the private sector making the major contribution to revenue, with virtually no revenue coming directly from government'.

Given its reliance on government funding, the impact of the global financial crisis on the British Government is likely to have flow-on effects for orchestras.

On 24 May 2010 the Department for Culture, Media and Sport announced a £19 million reduction in Arts Council England's 2010-11 income from government. This cut is additional to the £4 million cut announced in the April 2009 Budget. By drawing on £9 million of the Arts Council's historic reserves, access to which was previously blocked by government, it is currently anticipated that cuts to regularly funded organizations will be limited to 0.5 per cent rather than a three per cent cut (£10.8 million) that would have otherwise been necessary.

Arts Council England's budget for the next three years (2011-14) will be decided as part of the Government's spending review, the results of will not be known for another three months.

Despite the paucity of information, it is clear the UK is experiencing a level of 'artist in exile' syndrome (Higgins 2009: online) that many find concerning. As is the case in Australia, it seems many of the UK's best musicians do not live or work in the UK. Simon Rattle is with the Berlin Philharmonic, and unlikely to return. Conductor Daniel Harding lives in Paris and works with orchestras in Berlin and Sweden. Conductor Jonathan Nott lives in Switzerland. Composer Richard Ayres left 20 years ago. Many argue that the training available in Europe is superior to that available in the UK. Others argue the opportunities are greater – more concert halls, more festivals, more funds. Some, while playing in top recital venues in New York, Berlin, Vienna and Salzburg have never been invited to give a solo recital in London. Others argue that acceptance of and curiosity about new music is greater in Germany and Austria than in the UK. According to Higgins, for musicians working with orchestras, 'questions of practicality loom large. "Here [in Germany] you are financially secure," says Nott. "Living on the breadline, thinking you could be killed off tomorrow – that's part of orchestral life in Britain. You don't have your own hall to rehearse in; you can't spend time working on your sound." Harding says: "When you work in central Europe you get the time you need. There isn't the constant need to cut costs. At the LSO [where he is a guest conductor] we do find ways of being ambitious. But it is a constant juggling act."' Others argue that is the acceptance of the validity of the artist that makes working in Europe compelling 'If you say you are an artist here, that's a valid thing. In the UK it's laughable – you are a freak or a radical. In 2000, when I left, you had to be at the sensational end of things, hanging out with pop stars. That wasn't me.' In Germany and Austria, classical music is seen as part of the patchwork of everyday life.

For Higgins, ‘the answer is not (as we are so often urged to do by parties such as Arts Council England) to “shout about” the arts. It is to learn to talk about them seriously – in short, to grow out of our histrionic cultural adolescence.’

Concern about salaries is a theme shared with the United States where downward pressure on wages is reaching worrying levels.

IRELAND

Ireland’s Arts Council/An Chomhairle Ealaíon released *Public and the Arts 2006*, the results of the third survey of arts participation. Its first study was undertaken in 1981 and released in 1983, the second was undertaken and published in 1994.

While not using categories consistently nor often in a manner that makes easy comparisons with other jurisdictions, the 2006 study nonetheless demonstrates:

- The percentage of those surveyed who attended a classical music concert fell from nine per cent in 1994 to seven per cent in 2006. (The decline for attendance at jazz/blues was greater, falling from eleven per cent to seven per cent. The two most popular events – ‘mainstream’ films and rock/popular music both experienced increases, from 54 to 57 per cent and from 22 to 28 percent respectively, the latter going in the opposite direction to trends in Canada and Australia.)
- Those buying classical music increased from one per cent to four per cent from 1994 to 2006.
- People over the age of 55 were the most likely age cohort to attend a classical music concert.
- Tertiary educated people who live in a large urban area are ‘more likely to attend classical music activities’.
- Eight per cent of those surveyed played a musical instrument for pleasure and five per cent sang in a choir for pleasure in 2006.
- Nine per cent watched a classical music event and ten per cent listened to classical music in 2006 (compared with jazz/blues at nine and twelve per cent respectively and rock/popular music at 38 and 45 per cent respectively).

The study included the following comparison of attendance at selected arts events in selected jurisdictions (page 24).

	Cinema	Theatre/Play	Rock/Pop	Opera	Contemporary Dance
Ireland	57	30	28	4	3
Northern Ireland	54	23	21	2	2
Scotland	52	18	24	6	3
Wales	54	27	n/a	7	7
England	49	16	n/a	n/a	n/a
France	49	16	n/a	n/a	n/a
United States	n/a	12	n/a	3	n/a

Note: Figures are from most recent studies available. Definitions of artforms vary from country to country, e.g. opera may or may not include operetta, a play may be described as ‘a play’ or as ‘theatre’ or as ‘a play or drama’ etc.

EUROPE

As Jan Vičar (2000: online) observes, ‘Classical music has the longest tradition and deepest roots in Europe, where on the basis of simple attempts by the Florentine Camerata and further developments in southern, western, and central European centers it originated and gradually spread from the British isles and Scandinavia to the Ural mountains’. Vičar expects that ‘the influence of its strong institutional basis, which was created for its support, will reach deeply into the twenty-first century. The question is whether its continuity can ever be broken.’

Vičar asserts that in Western Europe, ‘It is sufficient to state that as a consequence of a strong tradition, social care about the cultural heritage, and conscious education and cultural politics the musical life in former giant cultural countries such as Germany, Austria, Italy, France, Great Britain, Holland and others is rich’ and that the disastrous future for the sector predicted by many has yet to show signs of eventuating. ‘The strength of European classical music is also self-evident by the fact that today there are a symphony orchestra and opera company in almost every major European city.’ Vičar goes on to look at countries or regions with ‘a lesser musical tradition’ such as Scandinavia and nominates Finland for special mention. ‘Today’s excellent situation of the art music in Finland is a result of a systematic music education program and an allaround [sic] state support for classical music including contemporary music. What is also new in Scandinavia is the large percentage of women composers, and that, for example, in Sweden up to 30–40% of contemporary composers originally worked in jazz or rock.’

While the on-going strength of classical music in western Europe is not necessarily surprising, Jutta Allmendinger and J. Richard Hackman (1996: online) argue that the former East Germany offers an interesting case study in the survival of orchestras:

> Two periods of radical political-economic change in the former East Germany illuminate dynamics of organization-environment relationships that generally are hidden from view. Historical, qualitative, and survey data from a longitudinal comparative study of 78 orchestras in four nations show that the contexts of East German orchestras changed significantly when the socialist regime took power after World War II, and then again in 1990 when that regime fell. Socialist rule only modestly affected orchestras’ institutional features, however; they continued to reflect centuries-old German musical traditions. The collapse of socialism in 1990, by contrast, provoked differentiation among orchestras – some adapted successfully to the new political-economic context, but others floundered. Successful adaptation was found to be a joint function of an orchestra’s prior strength as an organization and the kinds of leadership initiatives taken by orchestra leaders and players. Overall, the findings suggest that the size and character of environmental effects depend on the degree to which contextual changes alter (a) the strength of the link between organizational actions and resources obtained (resource contingency) and (b) organizations’ latitude to manage their own affairs (operational autonomy).

In 2008, Rachel Hocking of the University of New South Wales and Richard Letts of the Music Council of Australia released *International classical music audience attendance trends 1990-2005*. In this report 'classical music' refers to the widely-used term for artistic music played in concert-hall venues by classically-trained musicians and provides the following comparisons of attendance at classical music concerts, opera performances and ballet performances.

Classical Music Concerts

Country	Note	Attendance Rates 1990-1995	1996-2000	2001-2005		Difference 1990-2000	1996-2005	1990-2005
Flemish Belgium	4		36.1%	30.1%			-16.6%	
Canada Report 1		12.2%	8.2%			-32.8%		
Canada Report 2		8.4%	9.0%	9.5%		7.1%	5.6%	13.1%
Croatia	2		313,000	237,000			-24.3%	
Denmark		16.0%	17.0%	14.0%		6.3%	-17.6%	-12.5%
Finland	3	991,478	993,837	992,387		0.2%	-0.1%	0.1%
Ireland		9.0%		7.0%				-22.2%
Italy		4,237,000	2,896,000			-32.3%		
Macedonia			31,000	11,000			-64.5%	
Netherlands		12.8%	11.5%	10.6%		-10.2%	-7.8%	-17.2%
Russia		1,130,000	1,130,000				0.0%	
Spain		6.8%	6.8%	8.4%		0.0%	23.5%	23.5%
United Kingdom		12.0%	12.0%	12.5%		0.0%	4.2%	4.2%

Opera Performances

Country	Note	Attendance Rates 1990-1995	1996-2000	2001-2005		Difference 1990-2000	1996-2005	1990-2005
Flemish Belgium	4		12.9%	7.1%			-45.0%	
Canada Report 1		4.4%	3.0%			-31.8%		
Denmark		37.0%	41.0%	39.0%		10.8%	-4.9%	5.4%
Finland		4.0%		6.0%				50.0%
Ireland		6.0%		4.0%				-33.3%
Italy	5	3,359,000	3,698,000			10.1%		
Latvia	6	73,250	114,172	145,142		55.9%	27.1%	98.1%
Portugal	7	35,000	91,000	71,000		160.0%	-22.0%	102.9%
Spain		1.4%	1.8%	3.0%		28.6%	66.7%	114.3%

United Kingdom		6.0%	6.0%	7.0%		0.0%	16.7%	16.7%

Ballet Performances

		Attendance Rates				Difference		
Country	Note	1990-1995	1996-2000	2001-2005		1990-2000	1996-2005	1990-2005
Flemish Belgium	8		16.8%	17.0%			1.2%	
Ireland		3.0%		2.0%				-33.3%
Italy	5							
Netherlands		10.3%	10.0%	11.5%		-2.9%	15.0%	11.7%
United Kingdom		6.0%	7.0%	6.5%		16.7%	-7.1%	8.3%

Notes:

1 Attendance rates are measured as percentage that attended at least once a year. Some based on total persons assume a constant population.
2 Figures aregiven as a year average within the time frame.
3 Opera sales included with symphonic and other music concert sales.
4 This figure includes classical music with festivals, for which there is no definition.
5 Dance included with opera.
6 1990-95 average between years.
7 2001-05 average between years.
8 Dance defined as ‘ballet/dance’.

Sources:
Arts Council of Ireland Report. Last accessed 10th January 2008
Compendium Report from Compendium: cultural policies and trends in Europe. The Council of Europe/ ERICarts “Compendium of Cultural Policies and Trends in Europe, 8th edition”, 2007. Lists policies and trends by countries with links to arts sites. Reports can be generated from this site, but each country does not provide statistics in the same format. Last accessed 14th January 2008.
Council for the Arts Report - Overview of Key Demographic Trends - Possible Impact on Canadian Arts Attendance (2001 Census), November 2003. Last accessed 10th January 2008.

While many reports referred to theatrical productions and music concerts, the figures included in the table above are only from reports that specifically used the terms ‘classical music’, ‘opera’ and ‘ballet’ (as opposed to dance or contemporary dance). Ballet has been included as ballet orchestras are a source of employment for classical musicians (e.g. the Netherlands Ballet Orchestra and the English National Ballet Orchestra), and ballet companies continue to perform classical works with music by composers from the classical repertoire.

Hockey and Letts used the data primarily to show trends in attendance. However, the data available from the various countries differs considerably. In some cases we are given audience numbers – although it is not always clear whether this is the total number of individual people attending, the total number of attendances (paid and free), or the number of tickets sold. In some cases we are given a percentage, presumably the percentage of population attending. But we do not necessarily know whether this is total population or adult population and, in some instances, the percentage is so high that there is some question as to whether these are percentages of total population or, for instance, percentage of population that attends the performing arts. Finally, of course, in some cases we might be reading the results of sampling surveys and in others, the results of for instance census questions to the entire population.

Nevertheless, however the attendances are measured, provided that for each country the basis of measurement is constant, we can see trends.

The figures have been collated to show a percentage increase or decrease, for the period over which the data are available. For classical music, for example, full trends (1990-2005) are available for seven of 13 cases, data for 1996-2005 for four, and for 1990-2000 for two countries.

From the information available, classical music attendances decreased in eight out of the 13 reports found, over the period covered. However, seven out of ten reports showed an increase in opera attendance and four out of five reports showed an increase in ballet attendance, assuming ballet and opera grew at approximately similar rates (they were combined in the Italian statistics).

Reasons given in surveys for decreasing audiences included:

- a feeling that the attendee is not prepared for this type of cultural event (Bulgaria)
- an expectation that these events are only attended by one type of person, the elite (Bulgaria, Malta, Romania)
- lack of financial support and free time (Bulgaria, Romania)
- a lower standard of living (Croatia)
- family commitments (Ireland)
- lack of interest or preference to other activities (Ireland)
- a move towards the consumption of culture within the home (Croatia, Romania, Russia)
- difficulty getting tickets from decreasing ticketing outlets (Croatia)
- difficulty getting to performances because of worsening public transport (Russia)
- lack of cultural performances in rural areas (Denmark, Norway)
- lack of education and employment/financial ability (Denmark, Norway, Russia, Serbia)
- gender differences (Denmark – women attend cultural events more than men, Norway)
- ethnic/cultural differences (Belgium)
- lack of full-time performing arts institutions (Malta)

- scaling down of cultural programmes within schools (Poland)
- lack of programs within schools (Scotland – it was found here that if children aren't encouraged in culture and sports, then they will be less likely to pursue these activities later in life)
- move from state-funded to privately-funded venues for culture, meaning that companies need to focus on fundraising over other issues (Moldova)

Some governments have attempted to address the decreasing numbers with some examples given below:

- In The Netherlands it was found that people who were 'mature-aged' were more interested in traditional culture (including classical music) so programs in arts education were introduced into schools, to attract younger and newer audiences (e.g. immigrants).
- In Slovenia (where apparently more people attend a symphonic performance than the football), venues have remarketed themselves as conference centres as well as for performances. This allows cross-subsidies for the concerts.

AUSTRALIA

According to the 2006 census data, the audience for classical music (excluding opera) grew between 1995 and 2006. The participation rate increased from 7.7 per cent to 9.4 per cent and attendances increased from 1,081,000 to 1,508,100. On the other hand, the participation rate for live popular music events fell by nine per cent, although actual numbers increased by six per cent. The orchestral sector is, for the most part, buoyant with standards, management and audiences improving.

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Participation in the Arts

The Australian Bureau of Statistics (ABS 2009: online) found that 1,508,100 people aged 15 and over attended classical music concerts in the twelve months before interview in 2005-2006. This meant classical music concerts ranked last in the twelve venues and events surveyed. However, it nonetheless represents nine per cent of the Australian population aged 15 and over. Further, 58 per cent attended multiple times. The highest attendance was in the Australian Capital Territory (13 per cent), with the lowest in the Northern Territory and Queensland (eight per cent). Unsurprisingly, those living in the six state capitals represented the highest attendance at eleven per cent compared with seven per cent in the rest of the country.

Women were more likely to attend than men (eleven per cent compared with eight per cent) with the highest attendance among those aged between 55 and 64 (13 per cent), double the attendance rate of people aged between 15 and 24 (six per cent). Females aged between 15 and 17 had a far higher attendance rate (eleven per cent) than males the same age (one per cent).

The highest attendance rates were among those who:

- had postgraduate degrees (26 per cent) or graduate diplomas and certificates (23 per cent)
- were in the highest equivalised household income quintile (15 per cent)
- were born overseas in the main English-speaking countries (13 per cent).

While attendances at live classical music events grew substantially over those eleven years, there was a decline in the participation rate for the young. Assuming that the sampling methodology was sufficiently uniform over the period, 73 per cent of the classical audience in 1995 was younger than 55 but in 2006, only 63 per cent was younger than 55. Most of the very substantial increase in audience came from the age group 45 and over; indeed, this increase was 74 per cent. The increase in numbers for those aged 15 to 24 was only four per cent, and aged 15 to 34 only five per cent, not keeping pace with the overall population growth rate. Is this cause for concern? Observations that the classical audience is ageing are often met with counter-observations that people come to classical music later in life. This seems to be borne out by these statistics. However, the numbers needing conversion in their late forties seem to be growing dramatically on the top of static numbers for lower age groups.

In March this year, the Australia Council for the Arts released *More Than Bums on Seats: Australian Participation in the Arts*. It looked at Australians participation in the arts during 2009 and compared the results with the last similar investigation undertaken in 1999.

Key findings (pages 25-26)

- 62 per cent of Australians participated in music in 2009.
- 57 per cent attended live music events.
- 15 per cent creatively participated, most of whom – 11 per cent – played a musical instrument, five per cent sang and four per cent wrote or composed music.
- Three quarters of those attending live music performances attended other live music performances including pop, rock, country and so on.
- 41 per cent of all Australians saw live music in 2009.
- 22 per cent attended theatre/cabaret, 13 per cent classical music, eight per cent opera and seven per cent classical/electronic/improvised music or sound art.
- Those over 65 were more likely to have attended opera and classical music.
- Those under 34 were more likely to have attended new classical, electronic, improvised music or sound art.

Levels of creative and receptive participation within music (Table 10, page 26)

Art sub-form	Creative participation %
Play a musical instrument	11
Sing	5
Write songs, mix/ compose music	4
None of these (other)	2
Art sub-form	**Receptive participation %**
Other live music e.g. pop, rock, country, dance, etc	41
Musical theatre, or cabaret	22
Classical music	13
Opera	8
New classical, electronic or improvised music, or sound art	7

Overall, the report found (page 26):

> Music had the highest frequency of creative participation of all the art forms. For those who claimed to create live music the average frequency was 90 times a year. If a person played a musical instrument the frequency was 113 times a year; for singing it was 97 times a year and writing songs/mixing or composing music it was 54 times a year.
>
> Consumption of recorded music was extremely frequent with those who listen to music doing so 222 times a year on average. Radio and television were the sources that most drove consumption at an average of 270 times a year, while listening to music owned personally was done 214 times a year. Internet streaming of music occurred 112 times a year on average.
>
> Attendance at live music events averaged six times a year, with new classical/electronic/improvised or sound art the most frequently attended (eight times a year). This was followed by other live music (seven and a half times a year); classical music (five times a year); musical theatre and cabaret (three and a half times a year) and opera (three times a year).
>
> Around nine out of ten people who play an instrument, write songs, and mix or compose music, see their involvement as a hobby. The next most common reason for creative participation in music is for serious study.

The report, while finding lower levels of participation in the arts in regional areas, did not find large disparities between the states (other than Tasmania), unlike, for instance, the disparities in participation found between Canadian provinces or between the New England and Pacific region of the US compared with its East South Central and West

South Central regions. The report also found that Australians' engagement with the arts in 2009 to be more positive than was the case in 1999 and that those under 34 to be increasingly engaged with the arts.

The Orchestras in 2008

In February 2009, the Australia Council announced that Australia's six symphony orchestras – Sydney, Melbourne, Adelaide, Queensland, Western Australia and Tasmania – had made a smooth transition following their divestment from the ABC, albeit it after a somewhat rocky start for some.

Following divestiture, the Strong Report found that some were finding the going tough and the then Federal Government, in response to that report, implemented its $25.4 million Orchestras Review 2005 funding package, at the same ignoring some of the cuts proposed in the Strong Report.

In 2008 the consulting firm LECG evaluated the impact of that funding package and found that the orchestras had made great advances artistically and financially albeit that considerable financial challenges remained. Nonetheless the 2005 package relieved their immediate financial pressures.

LECG (page 5: online) found that:

> Despite some initial misgivings, the orchestras managed a remarkably smooth transition to the new arrangements. The logistical and organisational challenges in establishing the new independent companies while developing new superannuation, workers compensation and governance arrangements were considerable for what are in the main relatively small operations without specialist skills in these areas. Though funding support was available to assist with many of these tasks, there were some costs that were not fully supplemented at the time.
>
> The orchestras are developing distinctive business models that have gone some way to realising the Orchestras Review's vision that over time they would acquire their own unique identities.
>
> Since divestment, each of the orchestras has innovated in different ways. Each orchestra has done something special, and each has made a valuable contribution to the musical and cultural life of its community.

Classical Music in 2008

On 17 June 2010, Live Performance Australia released its report, *Size and Scope of the Live Entertainment Industry*. Prepared by KPMG it analyses the sector in 2008.

It found that the Australia Council AMPAG companies, which include the state orchestras, were operating within budget with total revenues of $378.7 million ($157.8 million from box office, $138.6 from government subsidy and $82.3 million from other sources relating to orchestra hires, royalty receipts and merchandising income) against total expenses of $372.7 million.

The report shows that the three largest event categories in the live performance sector were non-classical music followed by musical theatre and classical music. For this study, classical music was defined as 'any of the following in classical/contemporary art (i.e. current, but not 'pop') style: Orchestral music, Chamber music, Choirs and choral music, Recitals, and Singing/playing. All styles of the following: Sacred music and traditional music/ethnic music/world music'.

It gives the following profile for non-AMPAG classical music events (Table 18).

	Large performance	Medium performance	Small performance
	$/performance	$/performance	$/performance
Box office income	1,098,900	67,900	6,600
Government funding	54,900	47,800	4,100
Other	677,700	75,600	5,700
Total Revenue	**1,831,600**	**191,300**	**16,400**
Expenses	1,794,900	187,500	16,200

CONCLUSION

Whether classical music is in decline, as some argue, or whether as Botstein argues, 'we are in the midst of a global classical musical renaissance marked by a new vitality and higher standards of virtuosity and finesse' is no doubt a matter of perspective. Botstein looks firstly to Asia to support his contention.

> The Asian embrace of Western musical traditions took off in earnest after World War II. It first rose in Japan, then spread to Korea, and is now making its way throughout China, following the path of economic progress. The result: There are more young Asian instrumentalists and audience members for classical music than anywhere else in the world. In Venezuela, classical music training has become a powerful tool in the improvement of primary and secondary school education. When a nation backs music education, as in Finland, a new cadre of world-class young performers emerges and audiences grow accordingly.

What seems clear is that classical music in Australia is in better shape than is currently the case in the United States and possibly in the United Kingdom. Where the global financial crisis has cut deepest – in the United States and Europe – orchestras have suffered or are likely to start suffering. As Australia has been the only OECD country to avoid recession in the wake of the global financial crisis, its performing arts companies have, for the most part, escaped the damage experienced elsewhere.

What is also clear is that the orchestral funding model is crucial. In the United States where, as the Nugent Report commented, the model is a private sector model – philanthropy plus ticket sales – orchestras are exposed to the vagaries of the economy in a way not experienced by countries where the model is government led, as in the United Kingdom or many European countries. In economic downturns, both philanthropy and ticket sales typically suffer and the impact is typically rapid. However, as noted earlier, the British Department of Culture, Media and Sport has already cut the budget allocation for the Arts Council and, on 22 June this year, the Chancellor in his Budget statement announced that 'unprotected' government departments face average real terms cuts of 25 per cent in spending over the next four years. Given the state of the British economy, orchestras there may be about to face challenges Australia has so far been spared. The same is likely to be true for Ireland, one of the first economies to be felled by the global financial crisis. Nonetheless, although the current cuts in the United Kingdom are the result of the same economic crisis that hit the United States, the impact has been delayed.

That being said, in Australia, with a box office model strongly supported by government appropriation, orchestras here can still suffer and some have experienced the withdrawal of discretionary spending, although at present there is no indication that government support is under threat.

This paper has looked at the classical music sector at a time of enormous technological change. For the most part and in most jurisdictions comprehensive data on classical music was not routinely compiled prior to 1982. In many, but by no means all, jurisdictions, since 1982 a steady decline in attendance at classical music events has been tracked. What is missing is the data against which the past nearly three decades can be measured. Interestingly, the point at which data started to be systematically collected in the western world was also the point at which newspaper circulation started its steady, and now accelerating, decline – a decline that has dramatically outpaced any decline in support for classical music. The decline in newspaper circulation commenced ahead of the internet, ahead of the proliferation of interactive gaming, ahead of CDs and DVDs and, in many jurisdictions, ahead of subscription television. Nonetheless, the decline of newspaper circulation across the western world may provide some clues to changing uses of leisure time.

What is certain is that the world in which classical music is performed is very different from the world in which it developed. Also confirmed from the explosion of classical music in the East is that personal participation and attendance at classical music events is strongly correlated to educational achievement and increasing affluence.

Finally, as Flanagan and others have observed, as important and illuminating as paying heed to international trends is, paying close attention to the local environment is more likely to hold the keys to the ongoing success of Australian orchestras. Equally, recognizing that classical music has always required patronage or government support to underpin its viability, support for classical music should be seen as one of the core responsibilities of government. Along with those other essential services that are, to a greater or lesser extent, constrained in their capacity to achieve productivity dividends – health and education – the arts must be seen as central to the wellbeing of nation states and supported accordingly.

As Britain's Right Honorable Chris Smith once recalled:

> I remember when I first became Secretary of State for Culture, back in 1997, having immediately before that been the Shadow Secretary for Health, a friend characterised

> the move from one subject to the other succinctly. Remember, he said: Health is a *sine qua non;* Culture is a *raison d'etre*.

Education and health should, for government, be a sine qua non, and culture the raison d'etre, and all supported accordingly. If that case can be prosecuted successfully, the future of classical music should be secure.

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