



A time to look forward: Trends of engagement with orchestral music

A research study by the Royal Philharmonic Orchestra

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Front cover – Royal Philharmonic Orchestra and Vasily Petrenko perform Mahler's Symphony No. 8 at the Royal Albert Hall, October 2022



Photo: Andy Paradise

Foreword

James Williams, Managing Director of the Royal Philharmonic Orchestra

The performing arts community has been through seismic challenges in recent years. After a protracted period of venue closure during the COVID-19 lockdowns, performing arts organisations faced financial ruin when the Government failed to provide the sector with a sustainable post-pandemic roadmap to help them plan for the economic viability of performances and the safety of venues, artists, and audiences.

Even after social distancing restrictions fell away in 2021, there remained the task of encouraging cautious audiences back to the concert hall. The economic slowdown and cost of living crisis that followed compounded the trials imposed by COVID-19, leaving many arts organisations grappling with the challenges of how to survive and navigate the long road to recovery.

The performing arts remains one of the UK's greatest exports. The cultural economy creates employment and enriches community life. Whatever the shape and form of the UK's re-emergence from a recession, music and other performing arts will continue to have a vital role to play, helping the UK to build back and to heal from both the pandemic and Brexit, the effects of which are still significant.

The RPO Insights Report shifts the focus from structural and strategic debates on the performing arts and instead presents a very human picture of how orchestral music enhances people's lives and helps them through challenging times. We reveal how people used the COVID-19 lockdowns to find new ways to engage with the genre and we identify how orchestral music is supporting inclusion and diversity today. At a time of global conflict, music is a universal language that unites people of different tongues, geographies, and cultures – reminding us of what we have in common. And, when mathematics is being pushed towards becoming a compulsory school subject until age 18, our data uncovers the rebirth of a passion for orchestral music among a new generation – a clear curiosity and hunger among pupils as young as six to discover the orchestral world. There is a growing body of evidence that demonstrates that a quality music education boosts young people's academic attainment across subjects, whilst increasing confidence and cognitive ability¹. Rather than extended maths to the age of 18, there is perhaps a greater argument for young children to have the right to learn a musical instrument at school in the country that gave the world The Beatles, Freddie Mercury, Sam Ryder, Nicola Benedetti and Sheku Kanneh-Mason.

After years of darkness, struggle and anxiety for the performing arts in Britain, the findings in this report give us hope for the future. A future where people are drawn to music to enrich

their daily lives, where music discovery becomes an exhilarating life-long journey and where, ultimately, the concert hall experience can help to offset the challenges people face in their daily routines.

At the Royal Philharmonic Orchestra (RPO), we are committed to enriching society by making orchestral music accessible to the widest possible audience. This involves performing in the UK's regions and delivering a meaningful programme of community and education projects, via RPO Resound, which this year celebrates its 30th anniversary. Our commitment to sharing our research insights ensures that the audience is central to our thinking and our output. This RPO Insights Report provides valuable information which we will use to ensure that the arts are fully invested in and are used as a catalyst for building a better, fairer, more inclusive and understanding society.



Photo: Andy Paradise

Chapter 1

Journeys of discovery and terms of re-engagement

The start of 2022 seemed to herald a new and promising chapter for the performing arts industry; without the shackles of the previous two years, this was a chance to make up for lost time. However, with a large number of organisations on a financial cliff edge following the impact of the pandemic and with audiences still hesitant about stepping back into venues, in reality this was a period of nervous uncertainty for the sector.

From the perspective of the audience, 2022 was a story of continuation. Changes in the way people engaged with music during lockdown, and the continued gradual increase in engagement that started well before, carried on into 2022. We continued to see a positive progression of rising interest in orchestral music; we continued to see the different ways of pursuing these interests, particularly amongst younger generations; and we continued to see people exploring and expanding their interests in all genres.

During 2022, a lot of industry data and debate focussed on the slow return of audiences to the concert hall. However, the bigger – and much more important – feature was that interest in orchestral music remained very strong and continued to grow.

In this chapter, we examine the make-up of the existing orchestral music audience in 2022, how it chose to engage with orchestral music and how this is evolving. We then look at the audience's interests – how people explored and expanded their musical outlook, what they would like to know more about – and what live concerts they would consider attending.

'Orchestral' audience

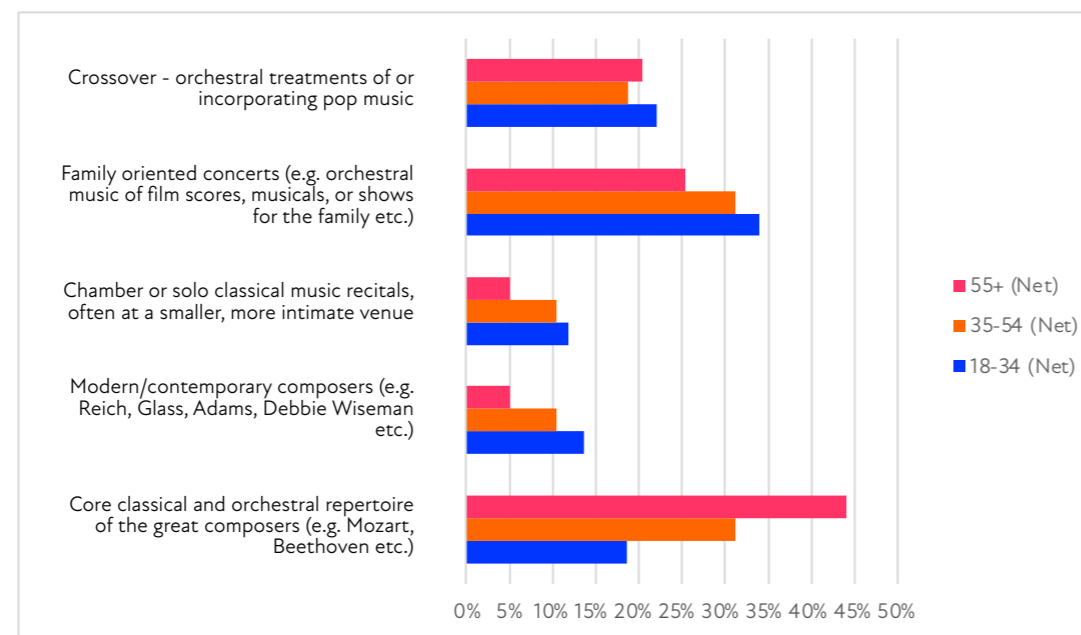
Today, 'orchestral' music has come to mean different things to different people. To get a sense of how the potential concert-going audience was constructed, we commissioned research to investigate the different styles of orchestral music people enjoyed the most.

More than half the survey respondents (55%) could point to a style that they enjoyed and most identified with. Of those who were interested in orchestral music, the most popular option was a repertoire of core classical composers, such as Mozart and Beethoven (33%). A further 9% of people preferred modern/contemporary music (such as Reich, Glass, Adams and Debbie Wiseman), whilst 9% most enjoyed chamber music. More than a quarter of the people who said they enjoyed orchestral music indicated that their preference was concerts featuring film scores, musicals or shows for the family (29%) – only narrowly behind the 'core classical' proportion.

Interestingly, looking more closely at the findings by age group, there were some notable differences in the styles of orchestral music identified as most enjoyed. Those aged under 35 were more likely to enjoy orchestral concerts featuring film/musicals (34%), or pop/rock crossover (22%) than a Mozart or Beethoven

performance (19%). By contrast, almost twice as many people aged over 55 enjoyed 'core classical' orchestral music (44%) compared to those aged under 35.

The types of orchestral music that people most associate with



A core part of daily life

While the concert hall remains a keystone for the full orchestral experience, by understanding how people were engaging with the genre, we hoped to better understand their relationship with it – giving some colour as to how they are engaging with orchestral music. We also compared these responses to those from before the pandemic (2018) to indicate how habits have changed following the changes to our daily lives caused by lockdown, and the 'new normal' that has followed.

Firstly, what stood out from the results was that more people are now listening to orchestral music as part of their everyday lives than was the case before the pandemic. Three in five (59%) people said they were listening to orchestral music daily (up from 55% in 2018). Interestingly, this trend was strongest among younger people, where two thirds (65% of under 35s) were listening to orchestral music on a regular basis – a 6% increase on 2018 (59%), and overtaking their parents' generation (57% of over 55s).

Since 2016, there have been both sharp rises and sharp falls in the proportion of people listening to orchestral music in different situations, reflecting the obvious changes in our lifestyles.

The results suggest that remote working, more prevalent than before the pandemic, has increased the proportion of people that listen to the genre while exercising, working, cooking, and pottering in the garden.

Meanwhile, with car use considerably down on pre-pandemic levels due to changed habits as well as higher running costs², the proportion of people listening while travelling dropped (from 30% to 19%). This was particularly the case for younger people who were half as likely as older generations to listen to orchestral music while travelling (13% vs 24%).

Increases since 2018

| | 2018 | 2022 | Difference |
|------------------------------|------|------|------------|
| While exercising | 5% | 11% | ↑ 6% |
| When working | 8% | 13% | ↑ 5% |
| When in the garden | 5% | 10% | ↑ 5% |
| While making love | 2% | 6% | ↑ 4% |
| When cooking | 14% | 17% | ↑ 3% |
| To wake me up in the morning | 4% | 7% | ↑ 3% |
| While going to sleep | 9% | 11% | ↑ 2% |
| When in the bath | 8% | 10% | ↑ 2% |
| When hosting a dinner party | 5% | 7% | ↑ 2% |

Decreases since 2018

| | 2018 | 2022 | Difference |
|--|------|------|------------|
| Whilst travelling (e.g., in a car, public transport, on a flight etc.) | 30% | 19% | ↓ 11% |
| When doing housework (e.g., ironing, cleaning etc.) | 19% | 17% | ↓ 2% |
| While reading | 15% | 13% | ↓ 2% |

These trends are most noticeable in younger generations: the under 35s were most likely to listen to orchestral music whilst cooking (25%), a significantly higher proportion than their parents' generation (15%). In fact, younger people were twice as likely as their parents' generation to be listening to orchestral music while working, while exercising, in the bath, going to sleep at night, and waking up in the morning.

Understanding people's everyday encounters with orchestral music underlines its relevance to daily life, whether through popular film soundtracks, computer game music, or the classics. The association of the genre with everyday tasks also helps to explain the growing popularity of orchestral music – and the contemporary cultural role it plays in society, in terms of wellbeing, inclusion, and enrichment.

Orchestral music as part of daily Life

| | Total | 18-34 | 35-54 | 55+ |
|--|-------|-------|-------|-----|
| Whilst travelling (e.g., in a car, public transport, on a flight etc.) | 19% | 13% | 16% | 24% |
| When cooking | 17% | 25% | 14% | 15% |
| When doing housework (e.g., ironing, cleaning etc.) | 17% | 16% | 15% | 19% |
| While reading | 13% | 9% | 13% | 17% |
| When working | 13% | 19% | 12% | 10% |
| In a concert hall | 12% | 12% | 10% | 15% |
| While going to sleep | 11% | 14% | 12% | 8% |
| While exercising | 11% | 17% | 10% | 6% |
| When in the bath | 10% | 17% | 8% | 6% |
| When in the garden | 10% | 12% | 9% | 8% |
| To wake me up in the morning | 7% | 10% | 8% | 4% |
| When hosting a dinner party | 7% | 9% | 6% | 5% |
| While making love | 6% | 11% | 5% | 2% |
| Other | 3% | 2% | 3% | 4% |
| Don't know/ can't recall | 5% | 4% | 4% | 6% |
| NET: Listening to orchestral music (2022) | 59% | 65% | 56% | 57% |
| NET: Listening to orchestra music (2018) | 60% | 60% | 61% | 71% |

Appetite for exploration and discovery

As well as looking at how people describe their tastes and how they are listening, the research also surveyed the strength of their desire to explore different genres. This includes looking at what interests people have, how they are pursuing these interests and, ultimately, how this might translate into a live orchestral experience.

Potential areas to explore

Our annual research has consistently revealed people's desire to learn more about a particular genre, with orchestral music being one of the genres that most catches people's imagination. Technology, and its rapid adoption by consumers, allows us to find out practically everything about a genre on a whim. This year, once again, listener records have been broken on platforms such as BBC Sounds³ and Spotify⁴.

According to the International Federation of the Phonographic Industry (IFPI), more than half of the UK population is now accessing a streaming platform⁵.

When it came to learning about new music, our own research found that eight in 10 (79%) had interests in new or unfamiliar genres that they intended to explore in the coming year. Orchestral music featured as the second most popular option, with 31% of people saying they would be interested in learning more about this genre. People over 65 were the most likely to immerse themselves in orchestral music (38%); however, one in four people under 35 (27%) said they too were learning more about the genre.

Learning more about a musical genre

| | Total |
|------------|-------|
| Pop | 33% |
| Orchestral | 31% |
| Rock | 27% |
| R&B | 23% |
| Dance | 20% |
| Country | 19% |
| Jazz | 15% |
| Rap | 15% |
| Folk | 11% |
| Metal | 10% |
| Latin | 9% |
| Gospel | 7% |
| African | 6% |
| Oriental | 4% |
| Other | 2% |

Fulfilling an interest in the performing arts

The research also considered how, beyond merely listening to more music, people were engaging with the art form by actively pursuing their interest in their own time. During 2022, three in five people (60%) said they were looking for



ways to positively fulfil their interest in the performing arts. Once again, the research noted how and how much different generations were doing this.

Among younger people, more than three quarters (77%) were doing something to further their interest in performing arts – significantly more than their parents’ generation (44% of people aged over 55). What they were doing also differed.

Younger people were four times as likely to listen to podcasts about the arts, teach themselves an instrument, or take online classes than those over 55; and six times as likely to follow organisations and artists on social media.

Engaging with the arts

| | 18-34 | 35-54 | 55+ |
|--|-------|-------|-----|
| Listening to the radio | 19% | 27% | 27% |
| Listening to more music (CDs, streaming, vinyl, etc) | 26% | 23% | 17% |
| Reading more about a particular interest I have | 22% | 17% | 15% |
| Watching TV programmes about the arts | 22% | 16% | 15% |
| Listening to podcasts | 21% | 14% | 5% |
| Visiting the websites of organisations that I like | 15% | 15% | 9% |
| Watching videos of performers/artists performing from home | 19% | 11% | 6% |
| Watching broadcasts of concerts/plays online | 16% | 9% | 7% |
| Following organisations/artists/performers on social media | 18% | 11% | 3% |
| Teaching myself (e.g., an instrument, or how to paint) | 17% | 9% | 4% |
| Taking online classes | 12% | 8% | 3% |
| Other | 2% | 3% | 2% |

Comparing the responses in our 2021 survey, the results showed a significant rise in the proportion of younger people reading more about interests that they had (up 6% to 22%), watching TV programmes about the arts (up 9% to 22%), and watching videos of performers and artists online (up 5% to 12%).

Attending an orchestral concert

Does this interest translate into ticket sales? Our 2021 research was conducted as the world re-emerged from lockdown and we found that people lacked the confidence to attend a concert; we were concerned that this, together with being out of the habit of regularly going out to enjoy live performance, might inhibit ticket sales, finding the return to the concert hall would be led by young people. For our 2022 research we wanted to get a sense of the public’s appetite for attending

orchestral concerts, as well as an understanding of the different types of performances people might consider.

The research found that 76% of people in the UK said they would consider going to an orchestral concert in the next year – broadly similar to the pre-pandemic figure (79%). This proportion was highest amongst younger people, with 79% of those aged under 35 saying they would be interested in attending an orchestral concert. Traditional classical repertoire concerts were the most popular choice, with just over a third (35%) considering going to a concert of this type. This was followed by concerts featuring hits from the musicals (28%), and film concerts featuring performances of the scores (27%), or film screenings with live orchestra playing the soundtrack (26%).

Comparing the responses in 2022 to the pre-pandemic years, whilst interest in attending different types of concerts has remained relatively consistent, there were rises in interest for family-friendly concerts (+3% to 19%), and concerts featuring video game music (+2% to 10%). For those aged under 25, concerts with soundtracks from video games were amongst the most popular with just under one in five saying they would consider going to such a concert (19% – a 3% rise on 2019).

Cross-pollination of audiences

Interestingly, reflecting our findings of a steady increase in interest from diverse groups in exploring more genres, this cross-pollination of audiences was clear in the types of concerts people are considering attending in the next 12 months.

Comparing pre- and post-pandemic responses of people who described themselves as either ‘core’ classical fans, or ‘pop’ orchestral fans (film, musicals, or pop crossover) the results suggested a degree of movement between the groups. Notably, the results showed the biggest rise in interest for different types of orchestral concert came from classical repertoire fans and older concert goers.

While traditional classical repertoire concerts (e.g. Bach, Beethoven, Tchaikovsky etc) were the most popular choice of concert both now (77%) and before the pandemic (78%) among self-declared ‘core classical’ fans, the main rises in interest were for other types of concerts. The largest rise was for performances featuring soundtracks from blockbuster films. A third (32%) of ‘core classical’ music lovers were considering attending a concert of this sort in the next year, up from just over a quarter (26%) pre-pandemic. Orchestral crossover/pop concerts (e.g. Abba hits) saw the next biggest rise (+5% to 28% this year), followed by video game music concerts (+4% to 11%), and soundtracks from TV programmes (e.g. Dr Who etc) (+1% to 22%).

Similarly, among ‘pop’ orchestral fans, while the movement was less pronounced this year, there were a number of interesting rises. The proportion who might consider attending a traditional classical repertoire concert increased slightly (up 2% to 27%), as did the proportion who would consider attending a film music concert (up 4% to 42%), pop/crossover concert (up 6% to 53%), and film screening with live orchestra (up 4% to 31%).

Types of concerts respondents might attend in the next year

| | National average | | | Core classical repertoire fans | | | Pop orchestral music fans (film, musicals, pop crossover) | | |
|---|------------------|------|------------|--------------------------------|------|------------|---|------|------------|
| | 2018 | 2022 | %age shift | 2018 | 2022 | %age shift | 2019 | 2022 | %age shift |
| Hits from the musicals (e.g., West End, Broadway etc.) | 30% | 28% | -2% | 32% | 32% | 0% | 47% | 46% | -1% |
| Soundtracks from blockbuster films | 27% | 27% | 0% | 26% | 32% | 6% | 38% | 42% | 4% |
| Pop/ classical crossover | 26% | 25% | -1% | 24% | 28% | 5% | 47% | 53% | 6% |
| Traditional classical repertoire (e.g., Bach, Beethoven, Tchaikovsky etc.) | 37% | 35% | -2% | 78% | 77% | -2% | 25% | 27% | 2% |
| Soundtracks from TV shows (e.g., Dr Who etc.) | 20% | 22% | 2% | 21% | 22% | 1% | 37% | 35% | -2% |
| Family friendly concerts | 16% | 19% | 3% | 18% | 18% | 0% | 28% | 26% | -2% |
| A film screening with live orchestra | 28% | 26% | -2% | 37% | 29% | -8% | 27% | 31% | 4% |
| Classic rock | 27% | 18% | -9% | 29% | 23% | -6% | 32% | 39% | 7% |
| Soundtracks from video games | 8% | 10% | 2% | 7% | 11% | 4% | 17% | 14% | -3% |
| Other | 2% | 0% | -2% | 2% | 1% | -1% | 0% | 0% | 0% |
| Don't know | 5% | 4% | -1% | 3% | 2% | -1% | 0% | 0% | 0% |
| Not applicable - I would not be interested in going to a concert or performance that featured classical or orchestral music | 21% | 24% | 3% | 3% | 7% | 4% | 7% | 7% | 0% |

Lord Paul Boateng, RPO Board Member

“As COVID-19 restrictions fell away, many presumed it would simply be a case of people returning to concerts and the cultural lives they had led before the pandemic. It was telling that, for most of 2022, industry commentators were comparing the rebuild to the benchmark before the pandemic struck.

In truth, people’s relationship with music and the arts changed during COVID-19. Our 2021 Insights Report showed how people found new and inventive ways to engage with the arts during the lockdown era. This played out in 2022. People did want to return to concerts, but it is also fair to say their journeys of discovery with the orchestral form changed during lockdown.

For many, 2022 was the year they returned to the concert hall, but they did so with a much broader appreciation of what there was to enjoy in the orchestral genre. More young people had discovered orchestral music during lockdown – helped by technology – and many people started to enjoy the genre in its broadest terms as a soundtrack to their everyday routines. All this showcases the musical discovery people want to experience today in the concert hall. People are aware of a broader range of entry points and may enjoy the majesty of the classical masterworks through an artistic journey that includes film music, gaming, family concerts, and orchestral interpretations of popular artists. When you take the walls down, the audience becomes bigger and, therefore, Mahler and Beethoven will be experienced by a far larger contemporary audience.

In 2022, with access to every type of music available at everyone’s fingertips, musical boundaries are increasingly less important. We have seen throughout our research over the last couple of years that people’s appetite for new and different music, and willingness to try new things, has never been stronger and continues to grow. This applies to existing classical audiences as much as anyone else, and we are delighted to play our part in enabling their exploration of a range of genres.”



Photo: Tim Lutton

Chapter 2

The orchestra and audience of tomorrow

So much about the future of orchestral music depends on young people and their relationship with the genre. Our research shows that young people are the most interested in discovering orchestral music, with this interest growing and developing year on year.

Consequently, we were keen to have a deeper understanding of the origins of this trend. We commissioned a new cycle of research centred on children aged between six and 18 that, together with our other findings, would help us to understand where orchestral music sat with tomorrow's orchestral audience. We were able to compare some of these findings with pre-pandemic research to get a sense of how orchestral music has continued to feature in young people's lives.

In this chapter, we look at the ways children are encountering and engaging with orchestral music, and their views on what would sustain their interest. We also note the music genres they would like to learn more about and pursue, as well as the musical instruments they are keen to learn.

Where children are discovering orchestral music

Overall, almost 9 in 10 (87%) children under the age of 18 are engaging with orchestral music in their daily lives. The most common way, according to 27% of respondents, is through music in films, followed by listening to orchestral music via YouTube.

School played an important role, but this changed according to age group. At primary age (6-11), school is the main way children engage with orchestral music (28%). By secondary school, however, children are more likely to engage with orchestral music while relaxing with headphones on (22%), or while watching something on screen (22%). And by sixth form, teenagers are three times as likely to be listening to orchestral music through YouTube, or on a bigger screen, than they are at school (42% vs 14%).

Comparing the 2022 responses with those from 2019, the biggest change was a rise in the proportion of students listening to orchestral music in the background to reduce stress. Considering that the US Surgeon General sought, in 2021, to address the "youth mental health crisis" that had been exacerbated by the COVID-19 pandemic⁶, these findings are significant. The percentage of children listening to orchestral music while doing their homework rose by 11% to 14%, while relaxing rose 9% (to 17%), and as they went to sleep at night rose by 8% to 14%.

Video games are a clear cultural influence for children. Overall, 18% of children said they listened to orchestral music as a soundtrack to a video game. Boys were more than twice as likely to mention video games as a source for hearing orchestral music (21% vs.9% of girls). Further, the influence of games starts early: around 15% of children aged between 6-11 said video games introduced them to orchestral music – a sign of how influential gaming is in giving young people a connection to the genre.

Situations in which young people engage with orchestral music

| | |
|--|-----|
| When it's in a film I am watching | 27% |
| When I'm on YouTube | 25% |
| At school | 23% |
| When it's in a TV programme I am watching | 23% |
| When I am in the car with my parents or another adult | 23% |
| When it's on the radio at home | 21% |
| When I am doing music lessons | 20% |
| When it's part of a computer game I'm playing | 18% |
| When I am relaxing with my headphones on | 17% |
| Before I go to sleep at night | 14% |
| When I'm doing my homework | 14% |
| When it is playing at a special family event (e.g., wedding, party etc.) | 12% |
| When I go to music concerts | 9% |
| When I go to the theatre | 8% |
| Another time | 1% |

How to get more young people engaged

Making a meaningful connection with young people involves a listening process to understand the terms on which they want to engage with the genre. To do this, we asked them what they felt was necessary to get more young people engaged with orchestral music.

Surprisingly, or unsurprisingly, eight out of 10 children (79%) said there was a lot more that could be done. At the top of the list, almost two in five respondents said there should be more music lessons at school, where young people could listen to the music. A similar proportion (35%) said there needed to be more school trips to orchestral concerts. Meanwhile, over a quarter of respondents (27%) said there needed to be a greater focus on getting young people to play in groups and ensembles at school (27%). One in six said they would like to see professional musicians visit their schools more frequently.

Social media was also an important factor across all age groups. A fifth of children said they would like to see more classical music on YouTube and social media, while 15% said that if they were allowed to use their mobile phones to share images and messages during a concert, then young people would be more likely to engage with orchestral music.

For older children, image and perception played a greater role. One in seven respondents over 16 said orchestral music would have more appeal if more celebrities went to the concerts. A similar proportion said orchestral music needed to sound more like pop and dance music to engage young people – a nod towards crossover music and more popular symphonic repertoire. 27% of older respondents said that orchestral music’s ability to break into the mainstream music charts would also improve the breadth of the genre’s appeal.

Learning about the genre

Around a quarter of children aged six-11 who were surveyed said their school did not encourage them to learn a musical instrument, a sentiment that was increasingly repeated as children progressed through the school (33% 12-16, and 73% of 17-18-year-olds). Set against this, our research found that around 85% of children either would like to learn, or are already learning, a musical instrument, with interest peaking at primary school (90%), then mirroring the above, waning as the children got older (82% of 12–16-year-olds, and 59% of 17–18-year-olds).

Among children from low-income backgrounds, the proportion not encouraged to learn an instrument rose to 31%. At the same time, these children were also more likely not to have experienced orchestral music as part of their lives (18% vs 13% average), and more likely to be not interested in playing, or already playing, a musical instrument (19% vs 15% average).

With the number of students sitting GCSE music in England now at its lowest level ever and entry figures falling consistently since 2008⁷ (and A-level music following a similar pattern⁸) this makes for uneasy reading. Government priorities have been focussed on STEM subjects for the last decade, and with under-investment in music teaching during this time, the profile and appeal of music in the curriculum, and the lack of support given to young talent – particularly from poorer backgrounds – is a major concern. Much work needs to be done to nurture children’s interest in music during secondary school age, and to sustain the desire to learn that’s so clear among younger pupils.

The orchestra of tomorrow

While the piano (33%), guitar (29%) and drums/percussion (23%) topped our poll, overall 62% of children were interested in playing an orchestral instrument. Of these, violin (10%), flute (7%) and trumpet (5%) proved the most popular.

Girls were more likely to play or want to learn an instrument than boys (87% vs 82%), with a slight difference in the instruments chosen. Girls were more interested in taking up an orchestral instrument (66% vs 59%), while boys were more inclined towards guitar (32%), keyboard (34%) or drums (24%).

Top 10 instruments children would most like to learn



1. Piano: 33%



2. Guitar: 29%



3. Drums: 23%



4. Recorder: 11%



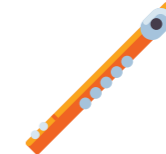
5. Violin: 10%



6. Bass guitar: 9%



7. Ukelele: 8%



8. Flute: 7%



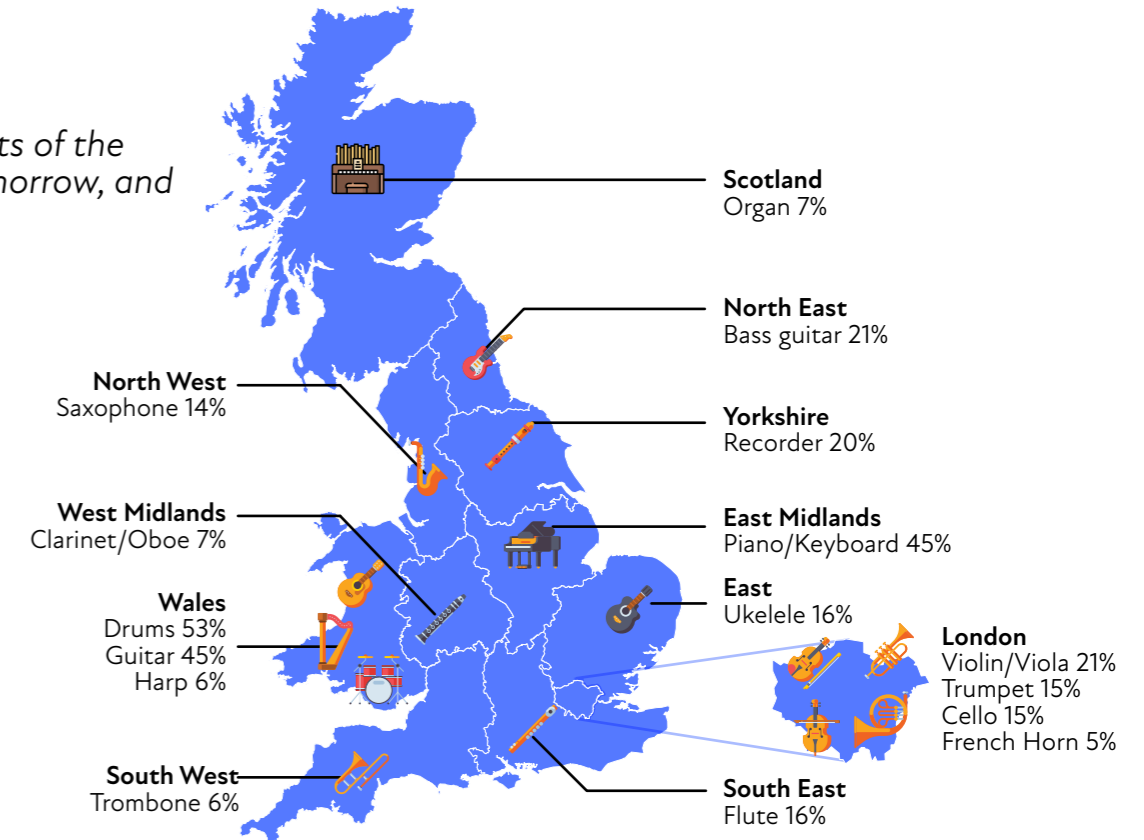
9. Saxophone: 6%



10. Trumpet: 5%

Children’s interest in learning a musical instrument was consistently high across all UK regions, with the appeal of orchestral instruments peaking at 82% in London and 66% in Yorkshire, Humber, and the East, respectively. Interest in specific instruments varied across the different regions.

Map: Instruments of the orchestra of tomorrow, and where they will come from



Liz Varlow, Member of RPO Viola Section and RPO Board commented: "The RPO of tomorrow will comprise musicians who are starting their journey today in school and learning a musical instrument. It's as simple as that. At the RPO, we are passionate about music's power to create a more equal and inclusive society, and this starts in the classroom.

We also need children from more diverse backgrounds to get the opportunity to learn an instrument and discover the genre. We are working to achieve this through our community and education programme RPO Resound, but a lot more needs to be done from Government. The recent pledge by Government to make a multi-million-pound investment into sports and music education was a step in the right direction, but it will impact only thousands of students – not millions.

We need to see music treated seriously as a GCSE and A-level subject and for children of all regions and backgrounds to have the same opportunity to learn an instrument as part of their education. Our research demonstrates the significant interest levels that exist, but this wanes by the time children reach A-level age, probably because their desire to learn an instrument at school has not been stimulated. We need talent nurtured now in order to populate the orchestras of tomorrow."

Chapter 3

Supporting inclusion and diversity

The future of orchestral music depends on everyone having access to it – learning about it, listening to it, and engaging with it, regardless of their background. At the RPO, we are working hard to connect with the broadest possible audience, to enrich lives by nurturing life-long journeys of musical discovery.

Efforts to grow the appeal of orchestral music among a wider, more diverse audience must start with listening to the people we want to connect with, to better understand their views, outlook, and their terms of engagement with the arts.

As part of our research, we surveyed a diverse range of audience groups and are able to present a viewpoint from each group; we looked at the ways in which they are listening and pursuing their interest in orchestral music, and their appetite to learn more. We also explored how children within these groups are engaging with orchestral music, how they are learning about it, and what they think would help get more children interested in it.

Global majority audiences

Our sample of more than 700 people from black, Asian, and minority ethnic backgrounds found that orchestral music was an important feature of their lives. Although the proportion that would describe themselves as a core repertoire fan (Beethoven, Mozart, etc.) was slightly lower (27%) than the national average (32%), around two thirds (65%) were interested in discovering more.

From a ticket-buying perspective, there was an above-average level of interest: the proportion that said they would be interested in going to a traditional classical repertoire concert (21%) was only slightly lower than those that would prefer a film music (23%), or family-friendly concert (23%).

While listening to music via radio and streaming were the main ways people were actively fulfilling their interest in music, this group was far more likely than the national average to be engaging through watching videos of performances online, listening to podcasts, watching broadcasts online, or online learning.

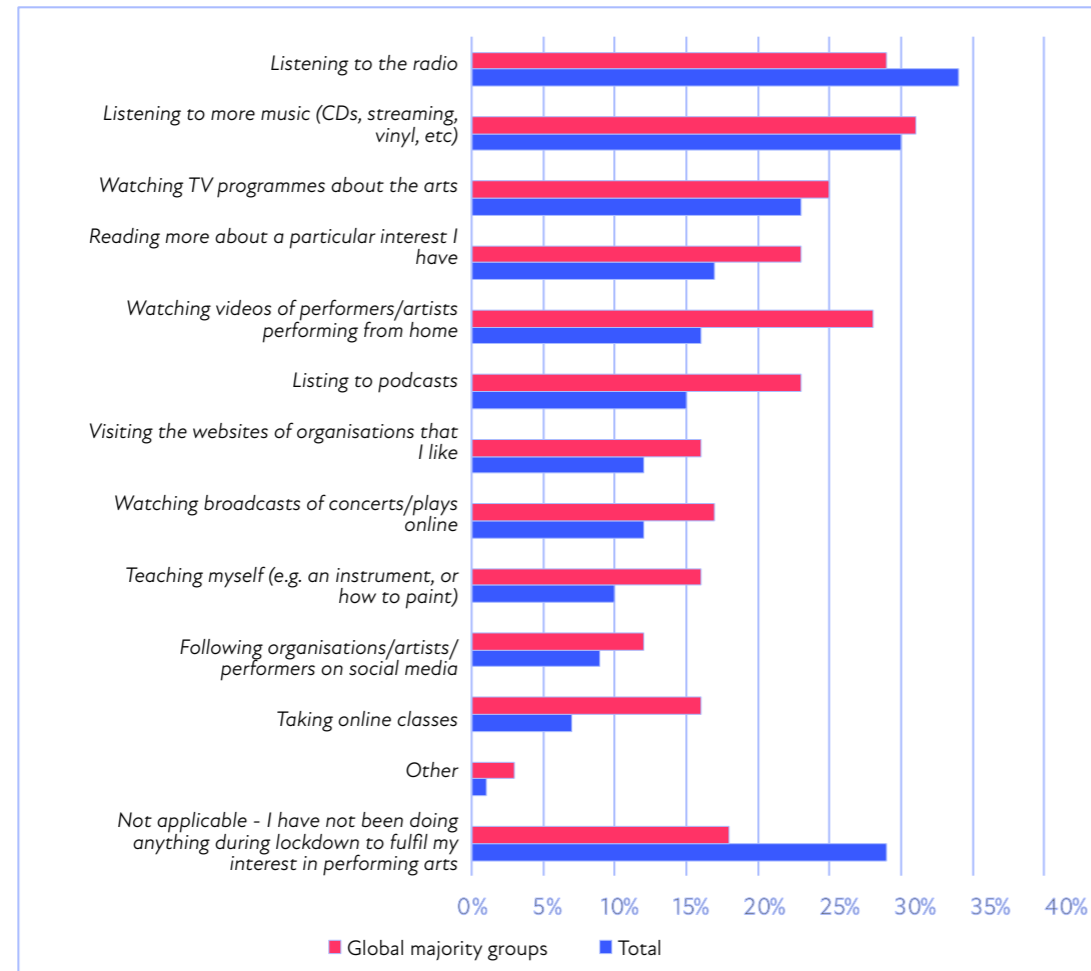


Photo: Umi Nur



Photo: Umi Nur

Pursuing an interest in the performing arts beyond going to concerts



Results suggest that children from black, Asian, and minority ethnic backgrounds are switched on, engaged orchestral music fans. In terms of learning an instrument, around three quarters (73%) of children from this group were encouraged to play musical instruments (far higher than the national average of 67%), with around four in five (81%) of children keen to play an orchestral instrument (again, higher than the average of 62%).

Children from this group were more likely than average to be interested in pursuing an interest in music (85% vs 79% average), with 29% interested in learning more about classical music. They were also more likely to listen to classical music as part of their daily lives – 72% (vs 59% average).

When asked about how to get more young people interested in orchestral music, the vast majority of those surveyed said there was a lot more that could be done, particularly at school. Around a third agreed that there should be more school trips to orchestral concerts, while a quarter believed that there should be more opportunities to play in orchestras at school. This group was also more likely to believe the answers lay in technology – 22% wanted to see more classical music on YouTube and social media (vs 17% average), while 14% hoped to see more opportunities to use their mobile phones during concerts (vs 11% average).

Low-income families

With ‘levelling up’ being a focus for Government policy during 2022, the research also included a sample of 200 families on low incomes (defined as living on less than 60% of the U.K.’s median income) to understand their terms of engagement with orchestral music.

More than half of people in this group said they enjoyed orchestral music; however, just 13% of those who did would describe themselves as being fans of “core” classical repertoire (e.g., Mozart or Beethoven). As many as two thirds (66%) said they would be interested in going to a concert performance that featured classical/orchestral music, with concerts that featured soundtracks from blockbuster films (23%), TV shows (22%) or family-friendly concerts (22%) being the most popular.

More than half (55%) said they listened to classical/orchestral music as part of their daily lives, and, in terms of exploring the genre, around a third (32%) were interested in learning more about orchestral/classical genres, which was higher than the average of 31%.

What stood out, however, were the responses from children from low-income families when compared to the national average. The results showed that low-income children were least likely to say they experience orchestral music when they are at school, or during music lessons, as well as being among the most likely to say they were not encouraged to learn an instrument.

Occasions when children said they experience orchestral music as part of their daily lives

| | Total | Low-income family |
|-------------------------------|-------|-------------------|
| At school | 23% | 14% |
| When I am doing music lessons | 20% | 10% |

Percentage encouraged to learn a musical instrument

| | Total | Low-income family |
|-----|-------|-------------------|
| Yes | 67% | 63% |
| No | 33% | 37% |

Perhaps unsurprisingly, they were among the most likely (19%) to say there are no types of musical instrument they would like to learn; less likely than average to say they would like to learn an orchestral instrument (58% versus 62% average); and less likely to be interested in learning more about orchestral or classical music (15% vs 37% average).

The research suggests that a great deal of work still needs to be done to nurture children’s interest in music. When respondents were asked how more young people

could be encouraged to get interested in orchestral music, the most common responses were to do with school: increasing the number of school trips to concerts, getting more young people to play when they are at school, and getting musicians to visit schools more often.

Rural communities

Enabling access to orchestral music for everyone has a geographical element. The recent plans to redistribute Arts Council England funding to organisations outside London saw more than 100 locations prioritised for new arts funding, with the aim of generating more opportunities and better access to cultural activities so that people will not have to travel as far to see world-class arts. Therefore, it made sense for us to take account of the needs and aspirations of the people most geographically isolated, and to understand their cultural needs and aspirations.

In terms of how they would describe themselves, people in rural communities were more likely on average to say they enjoyed orchestral music (57% vs 55%), and more likely to class themselves as a “core” repertoire fan (Mozart, Beethoven) (39% vs 32%).

Echoing the findings of this year’s Annual Participation Report⁹, which concluded that there were no significant differences in arts engagement between adults living in rural areas¹⁰, our results also found that rural respondents were as likely to be interested in going to a concert or performance that featured classical orchestral music as the national average. Interest in attending a traditional classical repertoire concert (e.g., Beethoven, Mozart, etc. at 30%) was among the two most popular options (narrowly pipped by West End hits at 31%), and well above the national

average (24%). People in rural communities were also more likely than the national average to be interested in learning more about orchestral music (34% vs 31% average).

This high-level of interest and engagement trickled down to the children, who were among the most likely to be listening to orchestral music as part of their daily lives (91%) – be it through YouTube (30% vs 25% national average), on the radio at home (28% vs 21% n/a), or as part of their sleep routine (21% vs 14% n/a) – as well as being among the most likely to explore their interests and learn more about orchestral music and opera (33% well above the national average of 23%).

One area of concern that the results did highlight was that this group of children is also among the most likely not to be encouraged to learn a musical instrument (36% vs 28% average). They are also among the least likely to experience orchestral music when they are at school (16% versus national average of 23%).

Again, we see how music experiences at school correlates to learning an instrument. According to our results, children from rural communities are less likely to be interested in learning how to play a musical instrument (79% versus 85% average), and particularly when it comes to learning an orchestral instrument (54% versus 62% average).

Schools also featured when it came to what they thought needed to happen to get more young people interested in classical music. 30% wanted to see more school trips to orchestral concerts (vs the average of 28%); 29% wanted to see more music lessons at school (vs 26% average); and 19% said it would help if there was easier access to libraries, resources etc., to learn more about classical music (vs 16% average).



Photo: Tim Lutton



Photo: Umi Nur



Photo: Tim Lutton

Ruth Currie, Director of Community and Education, Royal Philharmonic Orchestra commented: “At a time when the Prime Minister is looking at plans to ensure all pupils in England study maths in some form until the age of 18¹¹ making a further commitment to STEM subjects while music GCSE and A-Level take up continue to fall dramatically,¹² the results from this research should sound alarm bells. Quite clearly, without access to a well-funded, well-resourced music education at school, interest amongst children will continue to decline. This in turn will dry up the flow of the next generation of talented performers and engaged performing arts lovers, putting the whole musical ecosystem at risk.

“We are proud of our continued and committed efforts to make much needed change in our sector, to increase access to everyone and to open opportunities where they previously have been closed. We have made significant strides with the Black Lives in Music scheme to increase representation on the stage as well as in the audience. Our focus on national touring and regional residencies, as well as models we have developed for our community work (such as STROKESTRA®) have had a significant regional impact.

“But to make these changes sustainable requires government intervention at grassroot level. Schools are this country’s most overlooked super power. We look to music teachers to produce the next generation of Vasily Petrenkos or Dani Howards, but the support they receive consistently falls short of what is needed as STEM-related objectives take priority.”

Conclusion

The power of music to unite, inspire and enrich a troubled world: A personal view by Vasily Petrenko, Music Director, Royal Philharmonic Orchestra

As a conductor, I am fully committed to pushing boundaries - boundaries of performance, of perception and of the future. The Royal Philharmonic Orchestra and I will work tirelessly to broaden our appeal to new audiences, be innovators in community engagement, inspire life-long learning and be creative on digital platforms. My vision is for the RPO to make tangible the important role that orchestral music plays in everyone’s lives and its enriching impact on society at large. To achieve this we will adapt how we connect with people and our programming will embrace new trends, ideas and technologies - but the constant will be our aim to give benchmark performances in the UK and around the world.

The RPO’s consumer research over the last 12-months demonstrates that there are many encouraging developments to celebrate. As this report illustrates, there is strong interest among school children in learning a musical instrument; there is resurgent interest in returning to music venues after the Covid era – and there is clear evidence that new audiences are becoming more curious about the orchestral genre. With such a focus on inclusion and diversity, our research underlines that many answers can be obtained simply by listening to people.

As we re-emerge from the pandemic, we are reminded about what unites us as people. Music has been and continues to be vital; it inspires us to be creative and to endure challenging times; it supports people’s wellbeing, with many exploring new genres and learning to play musical instruments. The important role that culture plays during times of hardship reminds us that we all have an obligation to cherish the things that matter to us. The Royal Philharmonic Orchestra has proven its resilience, leadership and creativity at one of the most challenging times in living memory and our Journeys of Discovery concert series has underlined the important and constant role that culture plays in society at a time of unprecedented disruption. We have presented a season to inspire people to start their own journey of music discovery with the firm belief that these journeys will have a positive, clear impact on the health and wellbeing of society at large.

Looking to the future, I believe that the Royal Philharmonic Orchestra is well placed to define what the modern orchestra will look like. Every ingredient and every building block is in place to trigger a golden age for the RPO and, as its Music Director, I envisage that the interplay of five key areas will be essential in helping us present the orchestra of tomorrow:

Inclusivity

The RPO’s mission is to bring the joy of music to everyone. To make music that ignites the fires of the imagination. That inspires us towards a more hopeful future and that is inclusive, so that everyone everywhere can experience the thrill and excitement of live orchestra music. Our goal is to make everyone feel welcome, for current and new audiences to feel respected and for musicians of all backgrounds to be given equal opportunities on merit. The Royal Philharmonic Orchestra is on

a journey to build an inclusive, relevant and exciting orchestra for the modern age, allowing the broadest possible audience to engage with the joy of orchestral music and live performance. Our education and wellbeing programmes, together with our comprehensive and versatile schedule of regional and international touring, allow us to reach the broadest range of audiences. This approach is supported by our programming, which is unmatched in its diversity and has music for everyone. We are on a journey and our audience surveys indicate that we are making positive progress.

Community and wellbeing

During 2022 the RPO's schools research has revealed that most children either played or wanted the opportunity to learn a musical instrument – a far higher figure than we had anticipated. For years, the RPO has set industry standards for music education through its ground-breaking RPO Resound community and education programme and my vision is to take this further, to develop a comprehensive community engagement and wellbeing programme, giving people of all ages and backgrounds the opportunity to engage, or re-engage with orchestral music. I see the RPO as a catalyst and stimulus for life-long learning, whether it be in the concert hall, online or in the classroom.

Relevance

Our outreach and execution will be relevant, authentic, and contemporary in approach, but without compromising our commitment to artistic excellence. Our seriousness about the music will be matched by bold plans to attract new and younger audiences and to create inspiring partnerships with forward-thinking organisations. We will continue to embrace the latest technologies and work more closely with a range of digital platforms to increase our reach.

International ambassador

The RPO plays an important role as a cultural ambassador for the UK on the world stage, not only by representing the country abroad, but by bringing people together and building bridges. Ultimately, music is a universal language that has the power to unite people of different countries, cultures and political views. In a world of division - political, economic, and cultural – no one should under-estimate the power of music to unite people and remind them of what they have in common. Indeed, you don't need to know any language to understand music.

Excellence

Underpinning these key areas is the Royal Philharmonic Orchestra's unrelenting commitment to artistic excellence. The quality and vitality of our programming and concert performances will continue to be the heartbeat of the RPO. Whether we programme well-known or contemporary works, we will nurture a healthy curiosity towards the music which will drive us to deliver special performances; to interpret well-known repertoire with new life and contemporary purpose and we will be unafraid to push musical boundaries. This approach will help power a true and lasting sense of discovery for our audiences.

In summary, the breadth of music the Orchestra performs, its commitment to building audiences, widening access, and placing orchestral music at the heart of contemporary society, is central to its future. The RPO's values of 'Imagine, Inspire and Include' are key to the Orchestra's identity and provide the foundation from which we will take it to a new level, cementing the RPO's future position not only as one of the world's reference point orchestras, but as the ensemble that makes the genre exciting for a new generation of music lovers. Together, we will continue to strive for excellence, enrich lives and inspire society towards a positive and hopeful future.

Vasily Petrenko
Music Director
Royal Philharmonic Orchestra

Research Methodology

The research used for this report (unless otherwise specified and credited) was conducted for the RPO by international research company Maru Blue.

The research was undertaken at regular intervals over the last 18 months: December 2020, February 2021, July 2021, November 2021, and January 2022. Each survey was conducted among a GB representative sample of 2,000 adults across the UK. The surveys were carried out online.

Highlights of the research appear in this report. Other material has previously been shared publicly and more information can be found at the RPO media centre at rpo.co.uk/news

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About the Royal Philharmonic Orchestra

As the Royal Philharmonic Orchestra (RPO) celebrates its seventy-fifth anniversary, its mission to enrich lives through orchestral experiences that are uncompromising in their excellence and inclusive in their appeal, places the RPO at the forefront of music-making in the UK. With a worldwide audience of more than half-a-million people, the Orchestra embraces a broad repertoire that enables it to reach the most diverse audience of any British symphony orchestra.

The RPO collaborates with the most inspiring artists with its new Music Director, Vasily Petrenko, who joined in August 2021. Vasily Petrenko is one of a roster of titled conductors that includes Pinchas Zukerman (Principal Guest Conductor), Alexander Shelley (Principal Associate Conductor), and Grzegorz Nowak (Permanent Associate Conductor).

The RPO aims to place orchestral music at the heart of contemporary society, collaborating with creative partners to foster a deeper engagement with communities to ensure that live orchestral music is accessible to as inclusive and diverse an audience as possible. To achieve this, in 1993 the Orchestra launched RPO Resound, which has grown to become the most innovative and respected orchestral community and education programme in the UK and internationally.

rpo.co.uk

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