



ROYAL
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ORCHESTRA

From Restrictions to Recovery: Public engagement with orchestral music during a critical year

A research study by the Royal Philharmonic Orchestra

March 2022



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Reflecting on a seismic year

Report overview by James Williams, Managing Director of the Royal Philharmonic Orchestra

At the beginning of February 2022, the Royal Philharmonic Orchestra (RPO) performed its first London concert of 2022 to a full house at the Southbank Centre’s Royal Festival Hall in London. The Orchestra had flown back to the UK the previous day from a 24-day tour of North America, which had culminated in a critically acclaimed return to Carnegie Hall. On both evenings, and on opposite sides of the Atlantic, Gustav Holst’s *The Planets* drew an electrifying audience reaction. It was like nothing had changed when, in truth, almost everything had changed.

A month earlier, as the UK slid back into restrictions for a second Christmas, we were not sure if our festive concert season with the Royal Albert Hall would go ahead. Our return to the USA in January had been booked 18 months in advance, but only a few days before our departure, we thought we might not get there. After we touched down in Los Angeles, the logistics of completing the tour under the cloud of Covid-19 had to be managed daily and we constantly had to adapt to changing dynamics beyond our control. And then there was the risk we might not actually get back to the UK to start our 2022 London season at the Royal Festival Hall.

As it happened, the US tour proved to be an enormous cultural milestone. The RPO was the first international orchestra to tour the USA for two years and our 75th anniversary London season with our Music Director Vasily Petrenko has exceeded all expectations. Capacity audiences, greater diversity of concert goers, and a visceral sense of unbridled joy shared between audience and ensemble have signalled a renaissance in live performance following two years of isolation and restrictions.

The return to the concert hall in 2022 is something for us all to celebrate, but we must not overlook the fact that during 2020 and 2021 the future of the performing arts community hung in the balance. Despite the efforts of the Government’s Cultural Recovery Fund, many of the UK’s leading performing arts organisations have faced financial ruin, many of our iconic venues have been days away from permanent closure and there continues to be a mammoth task ahead to support the network of regional venues that are vital to the cultural health and diversity of the nation.

At the RPO, we have never worked harder than in the last two years. Throughout the Covid-19 era, we have had to fight to survive. Less dependent on Arts Council England (ACE) funding than our peers, we have forged commercial partnerships and focused on evolving a strong business model that can give us agility and flexibility at a time of seismic change. We have been bold in our vision and resilient in our belief that giving the biggest possible audience access to the

enriching power of orchestral music can support wellbeing and recovery for individuals and communities. More broadly, the performing arts remains one of the UK's most important exports to the world, and orchestral music has an important role to play – economically and culturally – helping society rebuild and recover after the cruel ravages of the Covid-19 pandemic.

At a time of change, nothing is more important than to understand the mood of the nation, both the avid music lovers as well as tomorrow's potential audience for orchestral music, and we have been listening. Since the start of the pandemic, we have continued to commission market research at each major milestone. We have taken time to understand the consumer's relationship with music and to understand where the orchestral world fits in. We have asked people about how music helped them during the isolation and home-working era, and we have followed their feedback on how, when, and why they will return to the concert hall. In listening to thousands of real people, we have learned more about current and future audiences, and how we can shape our future strategy for community programmes and inclusion and diversity action plans, based on informed research gathered from a broad range of people.

This edition of the RPO Insights Report tells the story of what we learned from our consumer research over the last 12 months. The research highlights the transition period from restrictions to recovery. A huge amount still needs to be done to invest in the future of the arts but, as we discovered in February 2022 at our Royal Festival Hall concert, the audience belief in and desire for great orchestral music has returned and is stronger than ever. And this is the keystone from which the rebuild starts – the timeless and universal power of music to enrich, empower, and unite people even at the most challenging of times.



Photo Ben Wright

Chapter 1: Orchestral music: A tonic during Covid-19 restrictions

If 2020 was a year when we were forced into new and unfamiliar ways of living, 2021 was the year these ways of living were embraced for the longer term.

For the second year running, performing arts organisations were affected profoundly with more venue closures, cancellations, and confusion amongst concertgoers. The continuing economic damage this has caused is yet to be fully understood.

While the industry picture has been well documented, our research during the last year has given us an invaluable opportunity to understand the public's sense of engagement with the performing arts during this unprecedented period.

Adapting to successive lockdowns meant changes to our daily routines, our ways of working, and our outlook, some of which have become permanent features of our new lives.

The rediscovering of simple pleasures that began in 2020, contrasting with the fast pace of a pre-pandemic world, continued to evolve during 2021. The focus and attention on mental health became a feature of this period and, as people adapted to and coped with the volatile environment, music played a vital role in giving people cultural engagement, enrichment, and escape.

This chapter looks at the seeds planted in 2021, the extent to which these have grown into significant – perhaps permanent – elements that must be acknowledged and served by the industry.

1.1. Staying connected with music and the arts

From 17 May 2021, after months of empty seats and closed curtains, concert halls, theatres and other entertainment spaces were finally able to invite audiences back at full capacity. For the remaining seven months of the year, the industry did what it could to make up for lost time, only to be set back once again in November with the spread of the Omicron variant, closing venues in Scotland and Wales and denting the confidence of concert goers throughout the UK.

While there was massive enthusiasm for attending live performances (as we will see in the following chapter), remote listening continued to play a prominent role for music lovers in 2021, keeping them connected with performing arts.

Listening levels remained constant

Radio played a key role during 2021, with classical music often featured on the radio dials. Our research saw that the proportion of all UK adults who were relying on the radio to stay connected with the arts increased by 3% to 25%. However,

among classical music fans, this proportion increased by 5% to 37%, while the proportion listening to music on other devices increased by 5% to 31%.

These figures are reflected in this year's RAJAR (Radio Joint Audience Research) report. It found that Classic FM's listenership stayed above 5 million (sandwiched between BBC Radio 5 Live and BBC Radio 1). However, the average listener spent 8.6 hours each week tuned to the radio, up from 7.3 in 2020, representing a 14-year high.

At the same time, the UK's two other classical music radio stations saw an increase in listeners. BBC Radio 3 increased its listening audience by 9.4%, from 1.98 million to 2.17 million, and Scala Radio increased its audience by 28.7%, from 310,000 to 399,000.

Activities to fulfil interest

Engagement with classical music did not stop at simply listening. Three in five people (59%) said they positively looked for new ways to fulfil their interest in the performing arts. Among classical music fans, this proportion rose to 72%, up from 68% at the start of the pandemic.

The findings here are significant: the range of ways people chose to learn more about orchestral music during the last year is a measure of serious interest. Around three in 10 (29%) people looked to broaden their interest in the arts by watching programmes about it (up 8% on 2020). One in five (19%) watched broadcasts of concerts online (up 2% on 2020), and one in six watched other videos of artists/organisations performing online.

Age also played a significant part when it came to engagement with music during 2021. Among those aged under 25, 84% said they found ways to pursue their interest in the performing arts in 2021. This age group was twice as likely as other age groups, and four times as likely as their parents' generation (over 55s-5%; 18 to 24-year-olds-27%) to have explored new genres of music for the first time. Podcasts (23%), online content (20%) and social media (20%) were the principal ways by which this age group pursued their interests, compared with other age groups, which chose radio and streaming.

1.2. Music lifts mood and supports well-being

2021 was a challenging year for mental health. The most Googled search term in 2021 was 'how to maintain your mental health', and 'anxiety' was chosen by children in a study by Oxford University Press as their word of the year for 2021, while their teachers plumped for 'resilience'.

The comfort that orchestral music provided during lockdown in 2020, counterbalancing people's unprecedented stress and anxiety, continued during 2021.

When asked about all forms of music, two thirds (65%) of respondents in our survey said that they relied on music during 2021 to evoke calmness and well-being in their lives, while 69% said it inspired them and lifted their spirits.

Young people reported being particularly reliant on music, indicating the role that music plays in their lives. Four in five people under 35 turned to music to feel calmer, compared with around half of the over 55s, and 85% of young people turned to music for inspiration (compared with 56% of their elders).

Regarding orchestral music, the proportion of people that relied on it to maintain a sense of calmness and well-being increased to 20% in 2021 (up 2% from 2020), while those relying on it for inspiration and to lift spirits increased to 12% (up 3% from 2020).

Around one in 10 people (9%) said they relied on orchestral music to help them sleep (rising to one in five in the under-35 age group), while the same proportion turned to it to cope with grief or bad news (rising to 13% of people aged under 35).

1.3. Music while you work

Music helped people to concentrate while they worked remotely.

Around half of adults polled said they had music on in the background whilst they worked; however, those aged under 35 were three times as likely to have music playing as those aged over 55 (78% versus 26%).

Of those who used music to concentrate, just under a quarter listened to some form of classical music, be it orchestral, chamber, or opera, while they worked, putting the genre ahead of all others apart from pop music.

Most popular music to work to in 2021

Current pop / electronic / dance	25%
Classical: orchestral / chamber / piano music / opera	22%
Rock / Metal	20%
R&B	16%
Country / folk	14%
Jazz	10%
Musicals	10%
Blues	10%
Rap	10%
Gospel / religious	8%

1.4. Activities to boost well-being and enrich the day

When we first went into lockdown in March 2020, the extra time prompted people into new hobbies and activities, from bread baking to home renovation. By 2021, with restrictions lifting and life returning to pre-pandemic rhythms, time pressures increased once again. However, while the mainstream narrative moved on from hobbies, many people continued to pursue their interests and passions. In fact, these became important activities to boost their overall sense of well-being.

The research found that three in four people engaged in creative activities at home to help them through the year. The most common activity in 2021 was reading, with over half of UK adults saying that they read more books, which, despite the increasing constraints on time, was an increase of 6% on the previous year.

Baking and improving cookery skills continued to be a focus (36%), while the influence of the fitness instructor Joe Wicks endured into 2021 as a third of people spent more time exercising (up 6% on 2020).

Music played an important role here too, featuring in 40% of all creative activities that people spent time doing in 2021, marking it as the second most popular way people enriched their daily lives during this time.

One in five (19%) enjoyed listening to music on vinyl/CD, while 11% played a musical instrument to unwind. However, the biggest rise compared with 2020 came in the proportion of people exploring new genres of music (16%, up 5% on the year before).

Hobbies and Creative Activities in 2020 and 2021

	2020	2021	+/-
Read books	47%	53%	6%
Improve cookery/baking skills	31%	36%	5%
Exercise regime	27%	33%	6%
Learn new skills in the garden	18%	20%	2%
Enjoy physical music on vinyl/CD	17%	19%	2%
Explore new genres of music	11%	16%	5%
Learn/improve skills playing a musical instrument	7%	11%	4%
Write a diary	7%	11%	4%
Paint pictures	7%	9%	2%
Write poetry	3%	7%	4%
Write songs/music	5%	7%	2%
Start a blog/video diary	4%	4%	0%

1.5. Music is integral to the festive season

Despite the progress made during the autumn months after Covid-19 restrictions fell away, the Omicron variant ushered in another wave of 'Plan B' restrictions before Christmas 2021. There was no lockdown but, for many, it was a second Christmas with social restrictions.

Our final cycle of research in December 2021 showed us that, despite the Covid-19 challenges, people still wanted to enjoy the festive period and orchestral music had an important part to play in people's lives. Whether listening to music whilst wrapping presents, watching documentaries on television, or attending a concert, our study found that six in ten people (60%) intended to engage with orchestral music over the season. Overall, a quarter of UK adults (26%) said they would be listening to Christmas music and carols to get into a joyful mood.

How people planned to engage with orchestral music over Christmas

	Q4 2021
I will Listen to Christmas carols / Christmas music	26%
I will watch a film / TV programme with an orchestral score	17%
I will listen to classical / orchestral music on the radio	15%
I will try to go to a festive concert / carol service	12%
I will add classical / Christmas music to my streaming playlists	11%
I will watch concerts / documentaries on YouTube	11%
I will stream a Christmas/festive concert online	9%
I will buy classical / orchestral music for myself / my household (CD, vinyl, download)	7%
I will play computer games with an orchestral score	6%
I will play a musical instrument/ sing	6%
I will listen to classical / orchestral music podcasts	6%
I will buy classical / orchestral music as a present for others (CD, vinyl, download)	5%



Observations

**James Williams, Managing Director,
Royal Philharmonic Orchestra:**

"The home of orchestral music is the concert hall. Most people would associate orchestras with live performance, or iconic venues such as London's Royal Albert Hall. It is a performance genre where the magic and the joy are evoked via a shared dynamic between the musicians and audience."

"Whilst live music was significantly limited in 2021, the public's engagement with orchestral music grew – but in different ways. During the unprecedented era of home working, isolation, and social restrictions, many people connected with music to help them get through a challenging period. Some escaped through music, and others used it as an essential and enriching tool to help maintain health and well-being. Across the board, engagement with orchestral music grew. The figures from our research point towards a broadening and diversifying of the audience and greater engagement from young people. Digital platforms had an important role to play as a signpost to discovery, as did classical music radio. Some people learned a musical instrument, whilst others learned about the genre."

"The irony here is at the very time when many venues and ensembles faced a threat to their existence, consumers were engaging with the genre more than ever. As we re-emerge from Covid-19 restrictions, now is the time to understand the well-being lifeline the genre gave to so many. We require investment in concert venues across the UK and support for our orchestras, so that the growth in public engagement with orchestral music can be sustained going forward."

"The RPO has been at the forefront of innovation and resilience during the Covid-19 era. Our goal this year is to ensure that across the country, people from all walks of life have affordable access to orchestral music, on their doorstep. This is critical to ensuring that culture can help communities to rebuild after Covid-19 and increase inclusion and diversity within orchestral music. We are committed to supporting Government initiatives in this area."



Chapter 2: Return to the concert hall

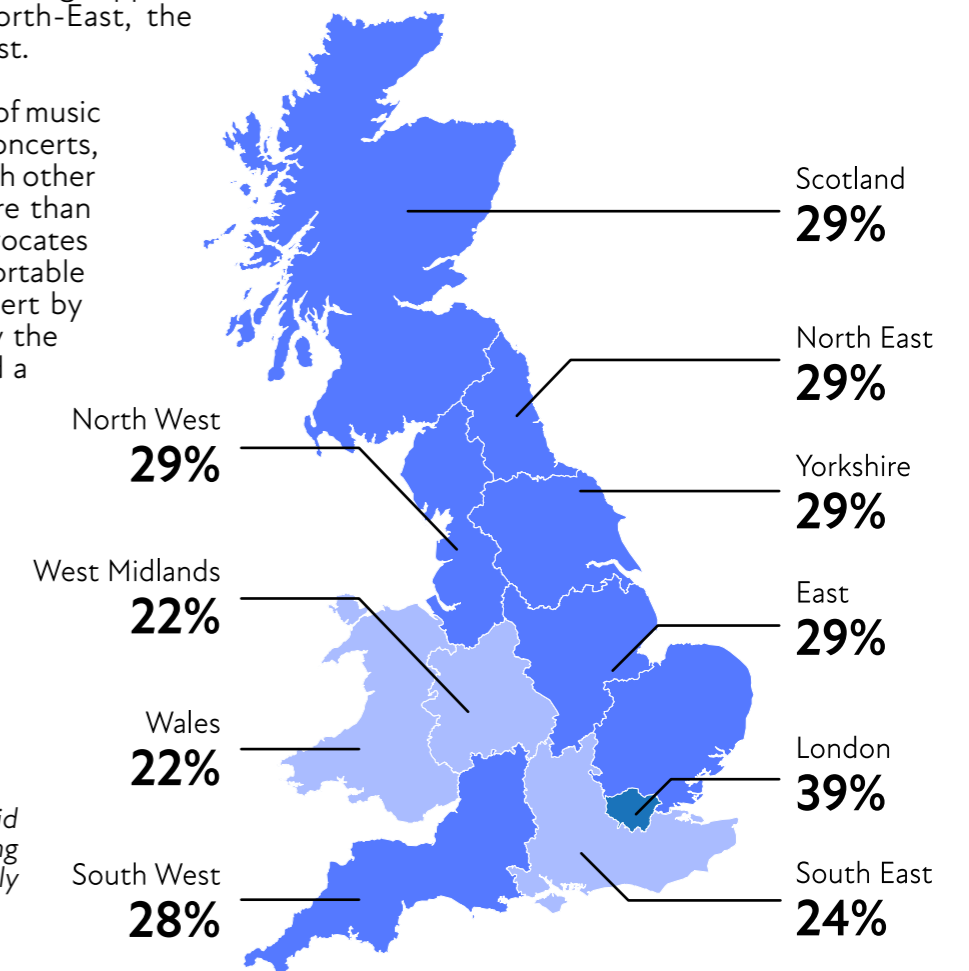
At the start of 2021, the future of the performing arts industry in the UK remained uncertain, with many organisations close to crisis point. Across the country, theatres and music venues had been closed for months and arts organisations were profoundly affected. Entire concert seasons were cancelled, and people lost their jobs. At the start of 2021, more than four in five members of the public (88%) knew the arts had been seriously affected by Covid-19 and faced an uncertain future.

Despite the perceived challenges, in March 2021, RPO research showed clear indications that a proportion of people were gearing up for a return to the concert hall and, importantly, were starting to believe it would soon be safe to attend cultural events and concerts. One in four adults said that they wanted to go back to the concert hall by the end of July 2021 and 39% said they were ready for a return to live music by September.

Music venues across the UK were working on plans to re-open and welcome back audiences. Significantly, the desire to get back to the concert hall wasn't unique to London. Whilst a return to venues by the end of July was most prevalent in London, there was comparably strong support for live music in Scotland, the North-East, the North-West, and the South-West.

When looking at specific genres of music and a propensity to return to concerts, orchestral music was on a par with other genres of music. Nationally, more than a quarter of orchestral music advocates (26%) said they would be comfortable returning to an orchestral concert by the end of July, rising to 37% by the end of September. This followed a lockdown period when the orchestral genre appealed to a broader audience, with a further 26% of adults saying orchestral and chamber music helped them to get through home isolation, inspiring them and lifting their spirits.

Map: Percentage of adults that said they would feel comfortable returning to the concert hall by the end of July 2021 – the national picture



2.1. Young audiences lead the return to live music

In the summer cycle of RPO research, clear signs emerged that younger people would be driving the return to live concerts. Nationally, three times as many young people planned to go to a live concert as soon as they possibly could (17% of under 35s compared to 5% of over 55s). Nearly half (46%) of people under 35 planned to attend a live concert within the next three months, compared with just 14% of people aged over 55.

This renewed interest in attending a live orchestral concert followed a summer where more than a quarter (27%) of 18-24-year-olds said they had taken the time to explore new genres of music – compared to just 5% of people aged over 55.

Of those young people that had discovered new genres of music, orchestral music was the most popular choice (30%). Moreover, almost four in five young people said that during Covid-19 restrictions they had fulfilled their interest of discovering new music genres in other ways. A younger audience was finding new and exciting ways to engage with orchestral music by listening to CDs, vinyl, or streaming sites. Some spent time enjoying podcasts, whilst others watched TV programmes about the arts, or followed their favourite arts organisations on social media.



Photo Ben Wright

The public's passion and desire to return to live music was a huge vote of confidence in the vibrancy of British arts and an acknowledgement that culture has a vital role to play in helping society to heal and rebuild after the pandemic. Significantly, people were more comfortable returning to live music performance than other public spaces such as football matches, nightclubs, cinemas, museums, and theatres.

2.2. Safety at music venues

The sustainability of live music depended on concertgoers feeling fully comfortable that indoor live events were safe and on venues demonstrating that they were working to consistent and exacting Covid-safety standards.

The RPO's summer 2021 research revealed that many people believed there was a lot of work to be done to rebuild the public's confidence that concerts were safe. Simply opening the doors was not sufficient; rather, people needed to be reassured about their safety.

Our study showed that nationally, only 15% of people identifying themselves as concert goers before Covid-19 said they could not wait to get back to indoor concert halls – with 8% having already booked concerts for the autumn and winter months. However, one in four respondents (25%) said they were not convinced that indoor concerts would be properly safe again – and these people were not really thinking about attending live concerts until that time. This sentiment rose by age group, peaking at 37% for those aged 65 or over.

The Government had lifted some restrictions but had failed to provide the performing arts with a sustainable operational roadmap that would ensure the economic viability of performances and the safety of venues, artists, and audiences. There were even talks of a Covid-passport which would enable people to attend large events. However, as our study showed, these needed to be introduced before September 2021 to help give concert goers confidence that venues and halls would be safe to attend.

There was a strong public sense that the Government had a key role to play in helping arts organisations get back on their feet. Overall, 24% said the Government needed to do more to support artists and venues, with 14% of respondents saying they felt the lack of transparency from the Government on the results of the Covid-19 pilot tests had undermined their confidence in going to gigs and concerts.

2.3. Welcoming audiences back: the first concert

As restrictions eased in the early Summer, everyone in the performing arts community wanted – or rather, needed – audiences to return to venues, but no one really knew the mood of the nation after 15 months of home working, isolation, and restrictions. Some in the arts world predicted something akin to 'The Roaring Twenties,' whilst others were concerned that lockdown habits would endure as the new normal. At this critical time, the RPO commissioned a fresh round of market research to capture the mood of the nation. We also partnered with the Insights Alliance to share the insights we had each discovered.

Our studies acknowledged that many people felt cautious about returning to indoor concerts, but the critical turning point was the 'first concert.' If organisations bombarded consumers with too much concert news and made too many demands, they would put people off. Encouraging people to try one concert, and their rediscovering the magic of a live performance in a safe environment was the powerful tonic that restored belief.

From the research, more than eight in ten people said that when they did return to a first concert their excitement for live performance returned as did their confidence in booking further concerts. The Insight Alliance's post-concert research between July and August 2021 painted a similar picture:

Return: the first visit back to a cultural venue saw post-event confidence levels rise from 53% before attending to 79% after the visit – a relative increase of nearly 50% – with 87% of respondents saying it would make them more likely to go to another cultural event.

Safety: overall, 81% of respondents felt safe, with high levels of confidence that venues had appropriate measures in place to keep audiences safe.

Enjoyment: more than four in five returners (83%) said there was a 'great atmosphere' at the performance they attended and gave the event an average rating of 4.5/5 stars.

The data gathered in the first weeks after the further easing of restrictions highlighted the continued 'threshold anxiety' being experienced by previously frequent cultural attenders, with higher levels of anxiety being seen ahead of the visit, particularly for first-time returners.

Both studies made clear that once audiences had a positive experience at a concert and felt sensible and proportionate safety measures had been put in place, most people wanted to book further concerts.

2.4. Backing from businesses

Support from the Government's Culture Recovery Fund provided short term support for many performing arts organisations including the RPO but, for many, not going bust was not the same as moving forward. As we approach the post-pandemic era, it is highly likely that arts organisations will need to partner more with the business community to secure the investment they need to grow and prosper.

An RPO study conducted in mid-2021 polled UK business decision makers, asking what they would look for from an orchestra if they were to consider supporting performing arts institutions in the coming years. The findings suggest that orchestras need to do more to appeal to younger people and support inclusion, education, well-being, and community.

Our research revealed that while the quality of performances topped the list of priorities for business leaders (27%), corporate decision makers are also considering a wide range of issues. More than one in five businesses (22%) said they would be more likely to support an orchestra if it could demonstrate its work was broadening the genre's appeal to younger audiences. In addition, 21% placed great importance on how the arts supported health and well-being, social inclusion, and education work in the community.

The perceived importance of orchestras doing more to appeal to younger people and supporting inclusion also played out in businesses being drawn to ensembles that reflected these issues in the music they performed. Overall, 19% of businesses placed importance on the diversity of repertoire that an ensemble played – and 15% rated the importance of orchestral music having powerful creative synergies with other areas of the arts, such as film and video gaming. Businesses were also drawn to orchestras that could demonstrate dynamism and the power to endure. One in five businesses placed importance on an ensemble's financial strength – and a similar proportion believed the history and reputation of an orchestra was important.

Most important attributes for businesses considering supporting a classical music organisation

Quality of performances	27%
Appeal to young audiences	22%
Support for health and well-being	21%
History and reputation	21%
Education work	21%
Financial stability	20%
Supporting social inclusion/mobility	20%
Diversity of repertoire	19%
How hard the organisation works	16%
Involvement with other arts (e.g., film and gaming)	15%
Prestige/brand association	15%
Digital capabilities and reach	15%
The potential to broaden brand reach	15%
Regional tours	15%
Corporate hospitality/client rewards/benefits	13%
International footprint	13%



Photo Andy Paradise

Observations

**Huw Davies, Deputy Managing Director,
Royal Philharmonic Orchestra**

"There is no question that the succession of lockdowns and Covid-19 restrictions had a devastating effect on live performance in 2021, with all concerned hoping for a swift resolution.

"Within this context, there have also been profound changes in the way in which many people engage with music – and, looking back to summer 2021, there was a risk that people might never return to concert halls. So much was unknown in terms of public mood at the point when social restrictions fell away in July 2021

"The research we commissioned provided invaluable insight into the public's terms of engagement with live music and we thank Insights Alliance for partnering with us at that time. The sharing of data between our organisations helped to guide thinking at a critical time and frame a road map on how to encourage people back to concerts in a manner that was warm, supportive, and encouraging.

"Insights from the business community also helped us to understand their terms of engagement with the arts and, going forward, their support and partnership will be crucial. At the RPO we are already fulfilling many of the criteria business leaders raised as part of our longstanding community, inclusion, and education programmes.

"Since the falling away of lockdown restrictions in May 2021, the RPO has worked hard on a strategy to bring the magic of live performance back to the public. The important role that culture plays in supporting the broader social and economic recovery means we all have an obligation to not only cherish those things that matter to us, but also to reciprocate and to get back to the buildings and people that make orchestral music special for audiences. Last year, we did everything in our power to ensure our concert venues were both safe and welcoming and we called on the Government to take the necessary steps to introduce industry-wide safety protocols to help rebuild consumer confidence in re-engaging with live concerts.

"The RPO's 75th anniversary season, our first with Vasily Petrenko as Music Director is well underway. We have been delighted to play to full houses at the Royal Albert Hall, the Royal Festival Hall and Cadogan Hall. Since lockdown restrictions were lifted, we have noticed that our audiences have been more diverse and, already, there has been a sense of magical excitement between the audience and the members of the Orchestra. Whilst access to online and recorded music helped people during lockdown, the recent months have confirmed that there is no substitute for the magic of the live concert hall performance. We have made significant progress in the last six months and whilst there is much more to be done in 2022 to secure the financial future of orchestral music, there is hope and there is belief."

Chapter 3: Inclusivity among audiences for orchestral music

Access to orchestral music, regardless of background, is vitally important for the future of the entire genre – not just in the UK, but worldwide. Understanding the barriers that exist to classical music is a serious issue that needs comprehensive data. Without this, it is not possible to address these issues and bring about change where change is needed.

Access to great orchestral music should be a right, not a privilege and this underpins the RPO's 'Join the Journey' campaign launched in September 2021 as part of the Orchestra's 75th Anniversary celebrations.

The issues that orchestral music currently faces require a collective response from the entire industry, with each stakeholder contributing. Concerted efforts are being made to increase diversity and inclusivity amongst the workforce and artistic programming, with Arts Council England's (ACE) 2021 report, Creating a More Inclusive Classical Music, leading the initiative. However, we must also look at our audiences and the role they play. Efforts to sustain and further diversify the orchestral music audience in the UK must start with listening to people from different backgrounds and understanding the challenges they face.

The RPO's tracking research now stretches back over five years, measuring and evaluating opinions of audience members on a range of different topics. At the end of 2021, we looked to shine the light on audiences from different backgrounds – whether ethnic minorities, LGBT, disabled, or low income – to understand their perception of orchestral music, the perceived barriers to entry, and their views on what change is needed.

For our research we asked an additional sample of respondents from ethnic minority, low income, LGBT, and disabled groups, whose responses were then compared against a nationally representative sample group.

3.1. Views on classical music

To begin, we asked respondents to describe their current views on classical/orchestral music – the extent to which they liked it, whether they were interested in learning more, and how welcoming they found it.

The RPO research suggested that orchestral music is making good progress on diversity, equality, and inclusion, with an even proportion of people across a wide range of audience groups saying they already liked orchestral music or would be keen to discover it in the next year. Whilst some may question whether the traditions of the genre could be a barrier to inclusion, the research revealed that only 5% of respondents said they felt the genre to be distant or unwelcoming.

Audience Group Views on Classical Music

Audience groups	Current audience: Percentage that says they like orchestral music today	New audience: Percentage interested in giving it a go	Potential reach of orchestral music in a year's time	Net % that say they don't like orchestral music	Percentage that says orchestral music feels unwelcoming
Rural	44%	22%	66%	18%	5%
Disabled	42%	21%	63%	18%	5%
LGBTQIA+	42%	19%	61%	15%	6%
Unemployed	46%	14%	60%	24%	9%
BAME	41%	19%	60%	13%	4%
Single parents	39%	19%	58%	17%	6%
Low-income families	38%	17%	55%	24%	7%

It should be noted that these figures were broadly on a par with the national average. One notable difference, however, came in the proportion of people admitting 'not knowing much' about the genre. As a benchmark, around a third of people (36%) in the UK admitted they did not know much about classical music; this rose slightly among people aged under 35 (39%). However, among respondents from ethnic minority backgrounds, this proportion rose to 42% – higher than any other group.

It is worth highlighting that among ethnic minority respondents, more than three in five (60%) said they were interested in experiencing classical music either this year or at some point in the future, which was slightly higher than the national average (58%).

This simple snapshot already hints at an important issue directly affecting diversity in classical music audiences. The extent to which people like or dislike orchestral music does not particularly correlate with a person's ethnic background, and ethnic minority groups are among the least likely to say that the genre is unwelcoming. This is, therefore, not so much a question of whether people like the genre, but more about the extent of their knowledge.

	Total	BAME/ Ethnic minority	Low- income families	Single parents	LGBTQIA+	Disabled
I don't know much about it	36%	42%	30%	38%	37%	35%

3.2. Encouraging change – education is key

The research looked at the areas people believed would most likely encourage them to discover new genres of music and explored the importance of various factors, including the performance locations, ticket prices, the music itself, and education and learning opportunities.

Again, the most common answers were broadly the same across each group surveyed. Local access to nearby concerts and affordability of tickets were the top two issues. However, beneath this people identified a breadth of issues involving many organisations – government, schools, recording industry, and arts organisations.

Ethnic minority respondents differed from the national average in that a higher proportion identified education as a route to musical discovery. The results showed that respondents from ethnic minority groups were more likely to say that music needed to be taught as a core subject in schools (5% above average), and that school children should have the opportunity to learn a musical instrument (5% above average); and that these were key drivers to enable musical discovery. These respondents also pointed to the fact that organisations needed to do more social outreach work in different communities (+5%) and to invest in education programs (+6%).

Ethnic minority groups' notable differences with the national average

	National Average	Ethnic minority groups	+/-
Music organisations and ensembles should invest in education programmes should attract people to their genre of music	14%	20%	+6%
Music organisations and ensembles should do more social outreach work in different communities	14%	19%	+5%
Music lessons should return as a core subject at school	18%	23%	+5%
School children should have the opportunity to learn a musical instrument	18%	23%	+5%
Music organisations and ensembles should be located / headquartered in the heart of communities (rather than prestigious city locations)	15%	18%	+3%
Arts companies/organisations should encourage more cross-genre music festivals	13%	15%	+2%
The history / heritage of a broader range of music genres and styles should be taught at school	14%	15%	+1%

This outcome demonstrates that education is the foundation of the musical ecosystem, the platform from which individuals start in their lifelong journey of musical discovery and is a key part in ensuring a diverse and inclusive workforce and audience in the future. In short, it all starts in the classroom.

Covid-19 presented several challenges to education, with music education taking a back seat as core subjects were prioritised – both during the pandemic and after as the ‘recovery curriculum’ was introduced. Against this challenging backdrop, all eyes will be on the publication of the Government’s revised National Plan for Music Education (NPME) expected later this year, to see that appropriate levels of investment are put into music education now to benefit the industry in the longer term. The call for evidence (published in August 2021) noted several areas of concern, highlighting that more could be done to help children access music opportunities, with over half saying they had been deterred from taking up musical activities due to cost, and a significant number saying options for studying a music qualification were simply not available.

Any efforts to drive meaningful and important change in the sector that might encourage greater diversity must be underpinned by a commitment to music education.



Photo Chris Winter

3.3. Regional inclusion

When thinking about what inclusion means in the orchestral world – equality of opportunity for anyone to have access, enjoy, and feel involved with music – the issues go beyond audience groups, cultures, and demographics. There is a significant geographical dimension.

Traditionally, London has been perceived as the beating heart of the classical music world. It has some of the most iconic venues, is home to famous ensembles, and the population is vast. Our own research before the pandemic indicated that London had more people who liked orchestral music than any of the UK regions.

This changed during the pandemic.

With concert halls closed, people moved online to enrich their lives with music. It proved to be a true democratiser, as younger, more diverse audiences engaged with the orchestral world. Geography was no longer an issue.

By mid-2021, as the country re-emerged from the first phase of lockdowns, our research showed the UK regions had aligned. Interest in orchestral music had fallen in London and risen in outlying regions. For the first time in years, approximately one in five people across all UK regions expressed an interest in orchestral music. There was also greater parity in the percentage of people across the UK regions that wanted to return to the concert hall.

This is perhaps one of the most significant – and potentially lasting – improvements in enhancing inclusion and diversity in the classical music world in recent years. Supporting orchestral music must now become a priority among policy makers and trade bodies because local access to affordable concerts is a cornerstone of cultural inclusion and investing in the revival of regional venues will contribute tangibly to local communities and economies.

This is a challenge that should not be underestimated. Recent analysis has shown that local authority spending has nearly halved (-43%) over the past decade, with £2.65 billion less being spent each year in real terms. Local Council culture funding now equates to around £43 per person. Speculation suggests that it could fall further still.

The RPO has a proud tradition as a truly nationwide orchestra, and our commitment to support the Government’s Levelling Up agenda through the regional development of orchestral music remains resolute. However, to achieve our goals, against a backdrop of unprecedented challenges, support will be needed.

Zerritha Brown, Brent 2020 Legacy Manager at Brent Council:

“Since announcing its move to Brent, the Royal Philharmonic Orchestra has not merely performed on several occasions to our community, it has become part of it. The fact the Orchestra is now embedded in the community means they have been able to facilitate meaningful and exciting opportunities, connecting musicians to new audiences and developing shared experiences and values. The council are immensely proud of our relationship with the Royal Philharmonic Orchestra and the partnerships we have been able to facilitate across the authority and within the community. We hope this will continue to grow, every year getting stronger, richer and more colourful, and we are excited about the prospects this could bring to all concerned.”

Observations

Liz Varlow, Member of RPO Board
and RPO viola section

“Orchestral music is a universal language that has lasted the test of time and, today, has an important role to play in uniting people of different countries, cultures and beliefs. We are delighted to note from the research that in the next year so many people are keen to discover the orchestral world for the first time– and this appeal touches almost all areas of society.

“The Royal Philharmonic Orchestra is on a journey to build an inclusive, relevant and dynamic orchestra for the modern age, allowing the broadest possible audience to engage with the joy of orchestral music and live performance. Our programming is unmatched in its diversity and has something for everyone. Furthermore, our education and well-being programmes – together with our history of comprehensive regional touring – allow us to reach a broad range of audiences, and our decision to move the orchestra’s headquarters to Wembley Park (London Borough of Brent) reflects our commitment to celebrate how we can positively contribute to greater inclusion and diversity in cultural, social, and economic terms.

“In terms of our own governance and workforce, we recognise that there is still much work to do to truly become an organisation representative of the audiences we serve and our work is underpinned by an ambitious inclusion and diversity action plan to drive positive change. As we mark our 75th anniversary, we are looking forward to the journey ahead – and inclusion and diversity will be embedded in our culture, goals, and aspirations.

“We cannot dictate who will or will not choose to like orchestral music, but our mission is to make it open and accessible to everyone – and to ensure everyone who chooses to discover the genre has an equal opportunity to have a joyful and enriching cultural experience.”

Concluding remarks from Vasily Petrenko, Music Director of the Royal Philharmonic Orchestra

The RPO undertook significant market research before the pandemic struck and usually the findings weren't that surprising: people like music and uplifting concert experiences, and enjoy discovering new gems to add to a playlist. It is in the more difficult times that the resilience to continue with audience research is important – and when the findings prove to be most illuminating.

Despite the enormous challenges, hardship, and loss that people have dealt with since Covid-19 struck, music has continued to play an important role, comforting and inspiring when most needed. During the periods of lockdown and social restrictions, our research highlighted a hunger for music discovery through online channels. People streamed more; people pushed boundaries and discovered new genres of music; and some people even learned a musical instrument.

As restrictions fell away last summer and again in recent weeks, the desire of many to return to the concert hall has been hugely welcome news. In the UK, we all went into the Covid-19 tunnel on the same day and in the same way, yet we will emerge at different times, in different ways, and at different speeds. Some people want to rush back to the concert hall, and some will take slow steps, but the important thing is to build confidence so that all will return. That is the keystone for the rebuild and recovery of the performing arts in the UK – and the RPO looks forward to welcoming people back to the concert hall with concert performances that will enrich, inspire, and evoke joy.

Whilst much still needs to be done by Government, policy makers, and the corporate world to invest in the recovery of the arts, the grassroots support from music lovers and concert goers is evident. And it is possible we may find the audience for orchestral music is bigger after the Covid-19 era. Our research during the pandemic points towards more young people engaging with the genre. It is also positive that people from diverse communities and backgrounds are interested in exploring the orchestral world. Inclusion and diversity provide passionate drivers for the RPO – sharing the joy of music to the broadest possible audience and building commercial resilience for the organisation by attracting a new





audience; but this needs to be understood from the audience's perspective. On the surface, as our research shows, it has never been easier to pursue an interest in a genre, with technology bringing down costs and increasing access. However, a sustained commitment to inclusion and diversity needs to address underlying issues of access to live music across the UK and music education. Currently, now more than ever, there is a real need for investment to drive meaningful change.

As we look forward to the world after Covid-19, culture and the performing arts will continue to bring meaning to our lives. It is a timeless truth that culture and the performing arts make us the human beings we are and give structure and sense to the society we create; they provide us with real values and fulfil our mental and emotional existence. The choices of our children to play music at a time of national crisis is significant in so many ways. It underlines the universal reach of orchestral music; it demonstrates the power of creativity to counterbalance fear and menace at a time of crisis, and it allows us to express feelings and emotions we cannot articulate with words. The things we have turned to during the Covid-19 crisis will be the very things that will also help us to rebuild society in the months and years ahead.

Photo Umi Nur

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

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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