making music

SUPPORTING & CHAMPIONING VOLUNTARY MUSIC

Treasurers’ Survey 2013: Summary Report

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Contents

Introduction

A huge thank you to those 27% of Making Music's 3,000 member groups who took the time to fill in this survey which ran to over 40 questions, with much detail asked for.

The survey is called ‘treasurers’ survey’ as it is mostly the volunteer trustees in charge of financial matters for our member groups who will hold all the information we asked for and therefore are overwhelmingly the people to complete it. They already contribute crucially to the running of our members’ groups and we are very grateful to them for the additional time spent on this survey.

The resulting information will be useful for lobbying and advocacy purposes, and not just for Making Music to make the case for voluntary music to the powers that be, but for amateur music groups themselves. Do therefore feel free to use the findings as detailed below, acknowledging Making Music as the source.

There were two separate questionnaires, one for performing members (86% of Making Music groups) and one for promoter members (14%) as there are issues which simply do not affect promoters (music sourcing for instance) and vice versa. But where relevant, the questions were the same, so unless specified below, results are for the whole membership.

Some comparisons to data from the 2010 survey are given in italics (some questions were not the same).

Executive summary

The amateur music sector is clearly **significant economically**: it is worth around £100m a year, and of high value to the professional music sector, with Making Music members spending around £18.7 million on engaging around 34,000 music professionals a year, commissioning an average of 400 new pieces of music annually and paying £1.7 million to music publishers every year.

It is also **significant socially**: our members alone represent around 170,000 individuals. If, as a DCMS survey of 2009/10 suggests, Making Music currently captures a quarter of all voluntary music groups, then there are nearly 700,000 citizens in the UK actively engaging with and participating in music.

And the amateur music sector is **resilient**: we know new groups are being set up every week and individuals become involved in music making or presenting all the time. Where obstacles arise or money disappears, these passionate musicians find new ways of doing what they love and what brings joy to them as individuals and to their communities.

However, **the picture emerging from this survey is an alarming one.** It suggests our members – and the amateur music sector at large – need our help and support more than they may ever have done in order to survive and thrive. Members put on fewer concerts to fewer audiences now than they did in 2010 when we last ran a survey, a key statistic for us to consider.

What these and other figures below reveal is that **the sector has been hit hard by the recession** as evidenced by the collapse of income from any public funding sources, which has only partly been compensated for by more support from local businesses and (limited) increased success with funding from trusts and foundations.

This is the first time the effect of reduced public funding on the voluntary arts has been shown since the start of the recession, and it is time the debate around arts and local authority funding recognised the significant impact the withdrawal of relatively small amounts of money is having on community groups.

At the same time, costs have risen: for hiring music and professional musicians in particular, but for venues, music scores and ancillary costs, too, necessitating higher subscriptions for our members' members.

These trends are worrying at a time when it is increasingly recognised that participating in musical activities has many benefits, for anyone, but perhaps particularly so for those struggling with illnesses or at the margins of society, for young people, and for communities as a whole. Higher costs and less local support mean less access for everyone to music groups, but especially for those least able to afford it and yet most in need.

And there is a **particularly concerning picture emerging about our promoter members**: those dedicated volunteers who, up and down the country and often in areas where there is no other professional music provision, give communities the opportunity to hear professional artists and ensembles in their locality, and frequently introduce new generations to music they would not otherwise hear. These promoters seem to have been hit particularly hard in the last few years, in terms of audiences, costs, members lost, funding and many other factors, forming a recurring theme in this survey.

Making Music will now seek to address its promoting and performing members' needs as revealed in this survey, and to ensure that it continues to support the sector to thrive, even in difficult financial times. As it has done since 1935.

1) Concerts and Events

Events numbers

Members organised a total of 23,000 events including 12,000 concerts, 7,000 open rehearsals and 2,500 educational events (eg workshops or visits).

Performing groups organised an average of 3.6 concerts a year, promoters 6.5. *This is down from an average of 3.9 and 7.4 respectively in 2010.*

Audiences

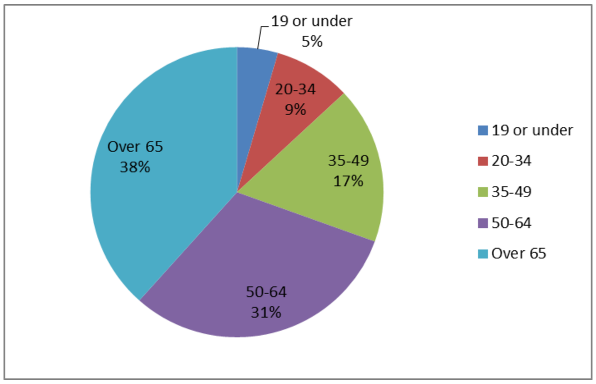
Total audiences are calculated at approximately 1.5 million annually. *Audiences are down from 1.9 million in 2010; most noticeably, promoting groups' audiences were down 36% (performing groups 'only' 20%).*

In the vast majority of cases, audience size per concert is in the 51-100 bracket, with performing groups also reporting a good proportion of audiences at 101-150, and even 151-200. For promoting groups, there is a substantial proportion reporting event audiences of 50 or fewer and a much smaller proportion with audiences in the higher two brackets *(a noticeable difference to 2010)*. There are hardly any promoters reporting audiences of over 200, whereas there is a sizeable amount of performing groups claiming audiences above 200 and up to 500 – *and figures for performers are very similar to 2010.*

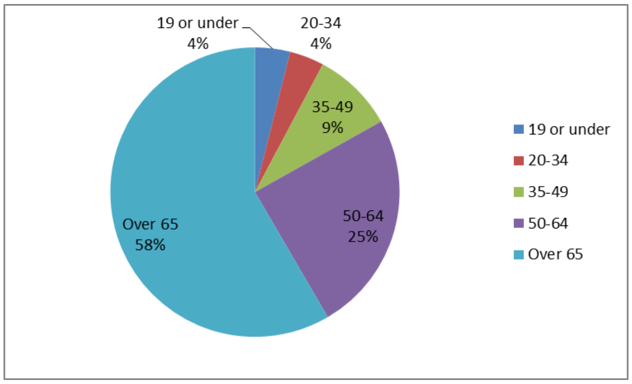
Audiences are 57% female, 7% are reported as disabled, and in most cases they are white (84% performing groups, 92% promoting groups).

Audience ages

Performing groups



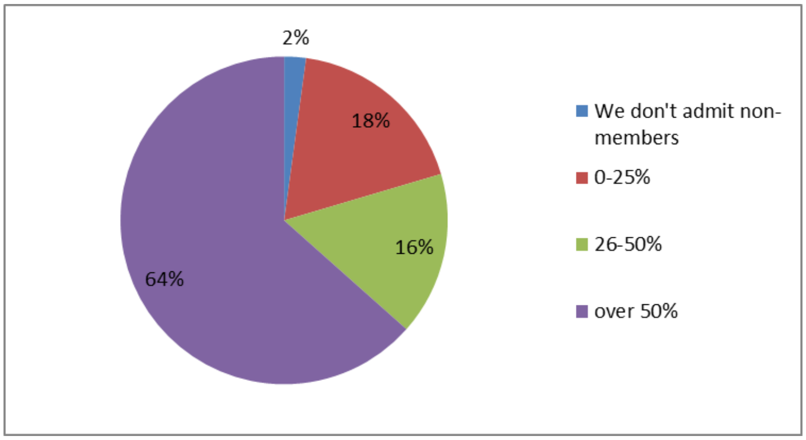
Promoting groups



Promoting groups' audiences are considerably older than those of performing groups.

Furthermore, *audiences are considerably younger than they were in 2010 for performing groups (31% now under 50, 2010: 8%) and somewhat younger for promoting groups (13% now, 2010: 5%).*

Promoting groups, just like performing ones, generally operate on a membership basis. This chart shows the proportion of their audiences which are members/subscribers:



In 2010, only a third of promoting groups' audiences were comprised of over 50% members – ie promoters were pulling in more non-members as audiences than they are now.

Ticket prices

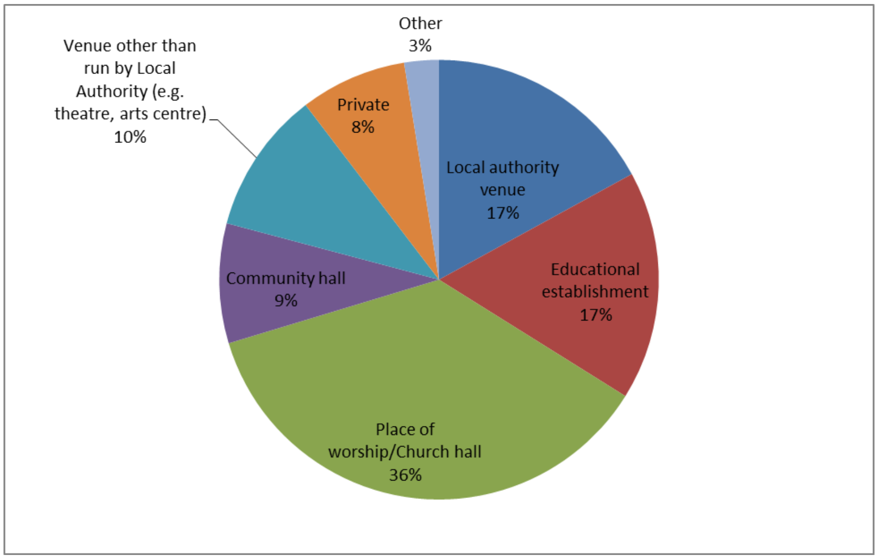
Promoters mostly charge their members £6-10 per concert, though a substantial proportion have members go free (and paying via a membership subscription, therefore); they mostly charge non-members £11-15 *(up from 2010)* and most do not offer any concessions. Where they are available, they are mostly in the £2-5 bracket.

For performing groups, for 50% of them the top and bottom price tickets are in the £6-10 range, 25% do not offer concessions, 10% have concessionary prices of £1 or less, 20% charge £2-5 for concessions, 30% charge £6-10, and in 10% no concessions apply (concerts free). *These figures are not substantially different from 2010.*

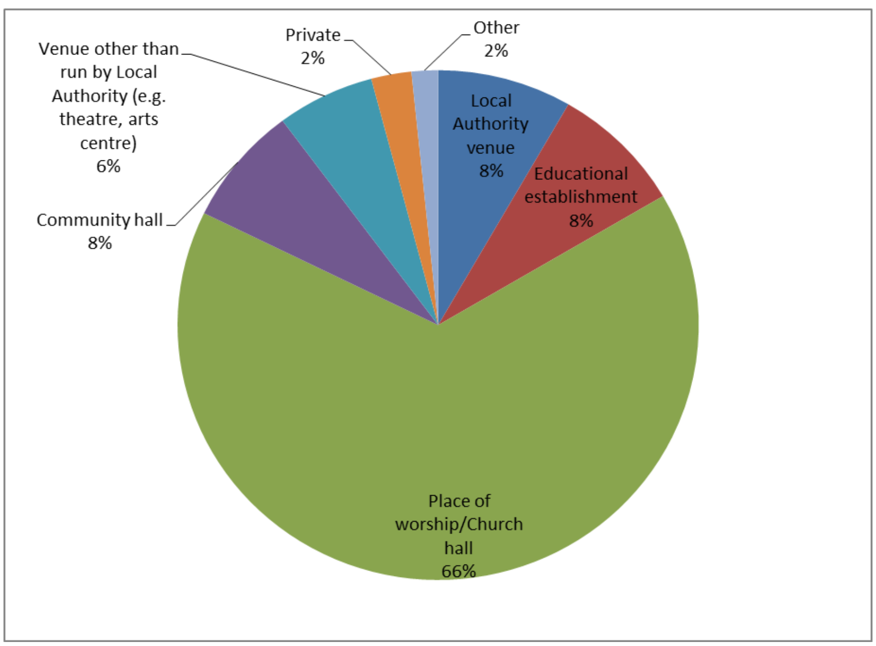
Venues

90% of venues used by either performers or promoters are fully accessible, *up from 85% in 2010.*

Promoters' venues



Performing groups' venues



The use of church halls is relatively stable by performing groups since 2010, but there is a noticeable move away from using such venues by promoters (down from 43% in 2010).

Event days and times

About half of all groups only programme events taking place in the evenings, with a further 35-40% also having the occasional daytime event. 14% of promoting groups focus on daytime events, whereas only 7% of performing groups do.

45% of performing groups hold their events on a Saturday, with Sunday (over 20%) and Friday (over 10%) still registering, but nowhere near as strongly, and the other days of the week barely getting a look-in at 5% each.

Promoting groups are more evenly spread, though again Saturdays are favourites (25%), closely followed by Friday and Sunday (20% each), with 15% programming for a Wednesday, only around 7% each for a Tuesday or Thursday, and fewer than 5% for a Monday. Fewer than 5% vary the weekdays of their concerts.

The concert time is overwhelmingly 7.30pm, with 8pm another option with promoters and early evenings with some performing groups. The overall picture is one of 7.30pm events on a Saturday evening.

There are no substantial changes in this since 2010.

2) Funding and spending

Financial wellbeing

- 69% of performing groups and 73% of promoting groups have an annual income of less than £14,500.
- 22% of performing groups and 17% of promoting groups have an annual income of between £14,500 and £31,000.
- 9% of performing groups and 10% of promoting groups have an annual income of over £31,000.

70% of performing groups generally break even (77% of promoting groups), and more promoters (39%) than performers (25%) occasionally make a small loss.

23% of performing groups and 17% of promoting groups make a loss every year and have to make up the shortfall by fundraising.

Only 7% of performing groups and 6% of promoting groups make a profit every year.

Overall size of the sector

The total estimated income for all members is £24m – if, as research from 2009/10 suggests, Making Music captures one quarter of all voluntary music groups, that means the amateur music sector overall is worth £100m.

Comparison with 2010 is difficult, but there is some indication that promoting groups have shrunk financially, whereas performing groups have increased their financial weight, and the overall size of the sector remains approximately the same.

Income sources

The overwhelming majority of our members cite membership subscriptions (93% of performing groups, 82% of promoting groups) and trading (86% of performing groups, 81% of promoters) as their main sources of income. Trading here means predominantly concert ticket and ancillary sales.

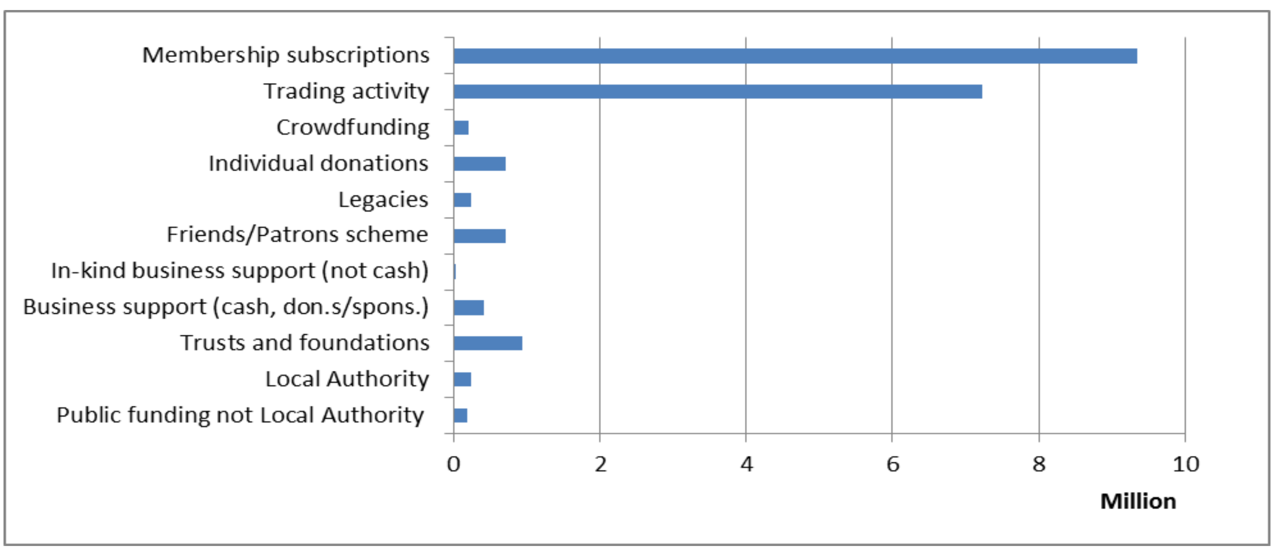
Other sources of income include individual donations (very significant particularly for promoting groups), friends/patrons schemes *(perhaps surprisingly, their significance is down compared to 2010)*, trusts and foundations *(compared to 2010, a similar number of groups now as then derive income from this source)*, support from local businesses, in-kind or in cash *(significantly more groups have turned to this as a source of income since 2010)*, crowdfunding *(new since 2010)*, legacies, and public funding from Local Authorities and other public funding bodies (Arts Council England, Big Lottery).

This is where our survey shows a really marked difference to 2010: 32% fewer performing groups and 52% fewer promoting groups are now able to access any local authority funding; and 20% fewer performing groups and 36% fewer promoting groups are now citing any other (non-local authority) public funding as a source of income, compared to 2010.

This means amateur music groups have been hit very hard by public funding cuts in the last few years – something entirely overlooked in the debate about arts funding since the economic crisis.

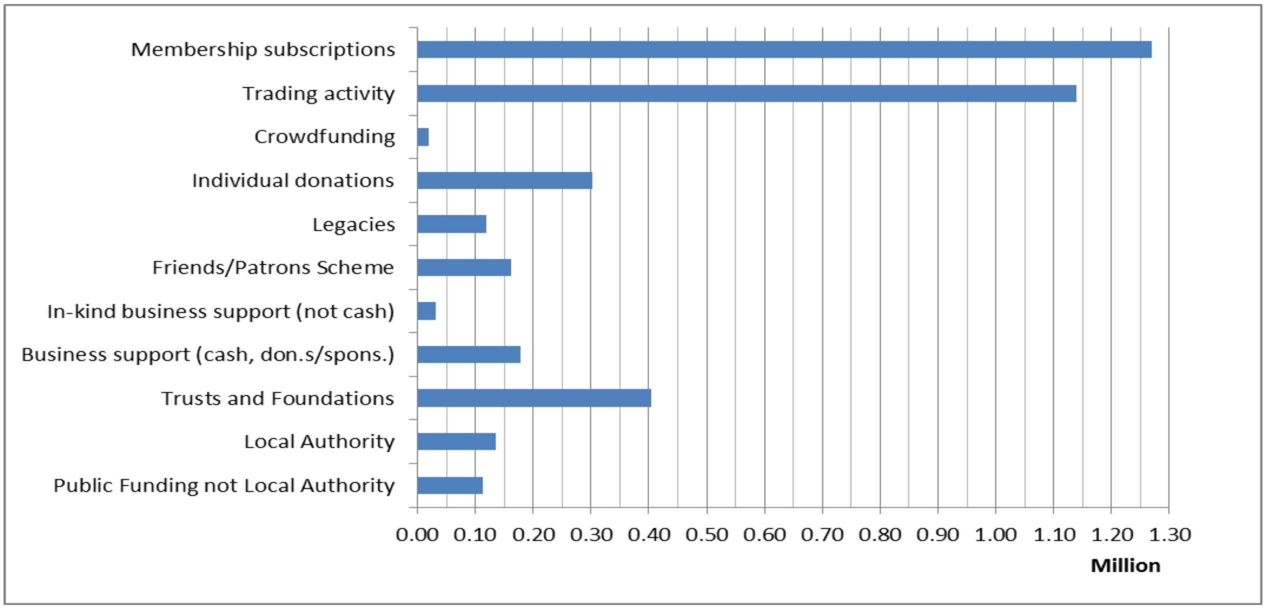
There are significant differences in how much each source of income is worth to promoting and performing groups.

Performing groups



Performing groups derive 46% of their income from membership subscriptions, 36% from trading, 4.5% from trusts and foundations *(now worth 36% more money than in 2010)*, 3.5% from individual donations and the same from friends/patron schemes, whilst local business support (in-kind or cash) is worth 2.5% of income and 1.2% is derived from legacies. Local authority funding at 1.2% is only just above other public funding (0.9%) *(and together they are now worth 42% less money than in 2010)* and newcomer-on-the-block crowdfunding (0.9%).

Promoting groups



Promoting groups only derive 33% of their income from membership subscriptions, 30% from trading, but over 10% from trusts & foundations *(but bringing 14% less money than in 2010)* and 8% from individual donations. Promoters do better from local businesses, too, with support at 5.5% of income (twice as much as performers, and *bringing in 10% more cash than in 2010*), whereas friends/patron schemes are a comparable 4% *(but the income from them is down 40% compared to 2010)*.

Also much more significant for promoting than performing groups is local authority funding at 3.5% *(but its monetary value is down 64% since 2010)* and other public funding at 3% *(worth 50% less money than in 2010)*, but still together a whopping three times the amount raised from these sources by performing groups. Similarly significant is income derived from legacies (also 3% and more than double that of performing groups). Finally, promoting groups are only supporting themselves through crowdfunding to the tune of 0.5% of total income.

Membership subscriptions

Nearly 30% of promoting groups charge membership subscriptions of £51-100 a year. Similar numbers charge £1-25 and around 20% charge £26-50 a year. In 20% of cases no subscription is payable.

For performing groups, it is much less evenly spread: over 40% charge subscriptions of £51-100 a year, over 20% charge between £101 and £200, only 10% have subscriptions of £26-50, and 5% respectively have no subscription or one of £1-25.

It is difficult to compare this to the 2010 data for a variety of reasons. However, it does appear that membership subscriptions overall have gone up. This would not be surprising given the economic situation and the diminishing amount of funding our groups are able to find from elsewhere.

Gift Aid

For performing groups, in nearly 70% of cases a proportion of their members Gift Aid their subscriptions; but nearly 20% of groups are not registered for Gift Aid; and in over 10% of cases no members' members Gift Aid their subscription.

Promoting groups take even less advantage of Gift Aid – or it may be connected to the nature of subscriptions which often buy attendance at concerts, rather than qualifying as a donation. Certainly over 35% of promoters say Gift Aid is not applicable, under 25% of their members Gift Aid part of their subscription, over 25% of them don't Gift Aid any part, and 10% of groups are not registered.

These figures are about the same as 2010 and seem to indicate this is a resource underused by our members.

Touring (performing groups only)

In the last five years, 13% of performing groups have toured at least once a year in the UK and 24% of them have toured at least once a year abroad.

But touring abroad is down by 3% compared to 2010, probably a symptom of the general economic situation in the last three years.

Spending on professional artists

Around £18.7million a year is spent by our amateur member groups on employing professional artists – either because they are presenting them in concerts or because they engage them as conductors, accompanists, composers, soloists and indeed as entire orchestras (eg for choral concerts).

This is around the same amount spent by our groups three years ago, but with the difference that spending among performing groups is up by 7%, while it is down for promoting groups by approximately 9%. However, this same amount of money buys our groups approximately 10% fewer artists – music professionals have become more expensive for our groups, but they have not been able to spend more money, so consequently fewer artists have been engaged.

This represents around 34,000 professional musicians' engagements with our amateur music groups a year, *down 10% from 2010.*

Music publishers

Performing groups spend around £1.7 million with music publishers every year, *up 9% from 2010.*

Pianos (promoting groups only)

In 2013, only a quarter owned their own piano. *In 2010, it was still nearly one third.*

3) Repertoire and planning

Contemporary repertoire

- 73% of performing groups' concerts contain at least one piece of music written since 1938
- 57% of performing groups' concerts contain at least one piece of music by a living composer
- 60% of promoters' concerts contain at least one piece of music written since 1938
- 43% of promoter's concerts contain at least one piece of music by a living composer

While over two thirds of groups did not commission a new piece of music in the last five years *(this figure is stable compared to 2010)*, a total of around 2,000 pieces were commissioned, meaning the amateur sector premieres around 400 new pieces of music or arrangements a year, *an increase since 2010*.

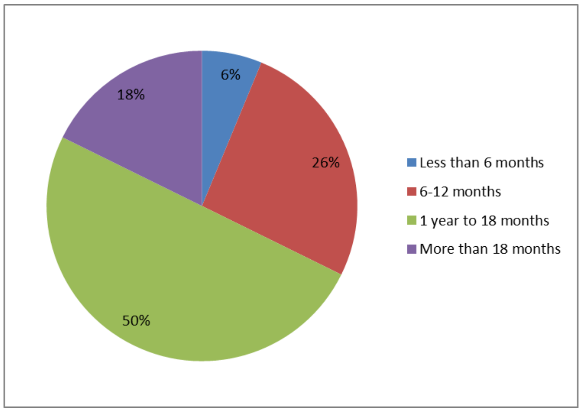
Artistic policy

Only 9% of promoting groups always promote the same kind of music and repertoire because that's what their members expect. 67% occasionally throw in something different, and 24% regularly vary the type of music and repertoire. *These figures have not changed since 2010.*

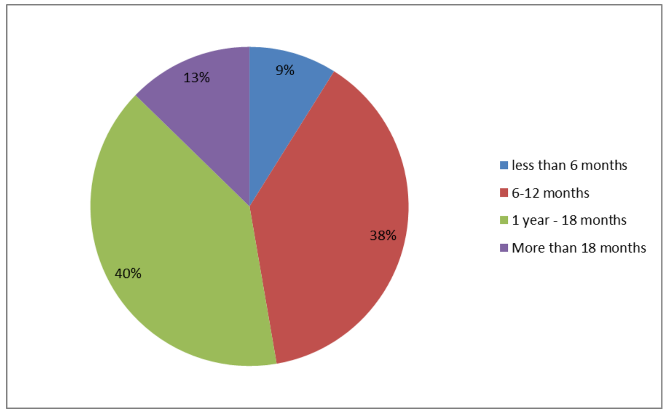
Planning

Promoters programme further ahead than our performing groups.

Promoting groups



Performing groups



In performing groups, 16% leave it entirely to the musical director to plan the repertoire, while in 23% of cases the committee retains a right to veto. 42% of committees describe themselves as 'somewhat influential' on the programming and only 19% as 'very influential'.

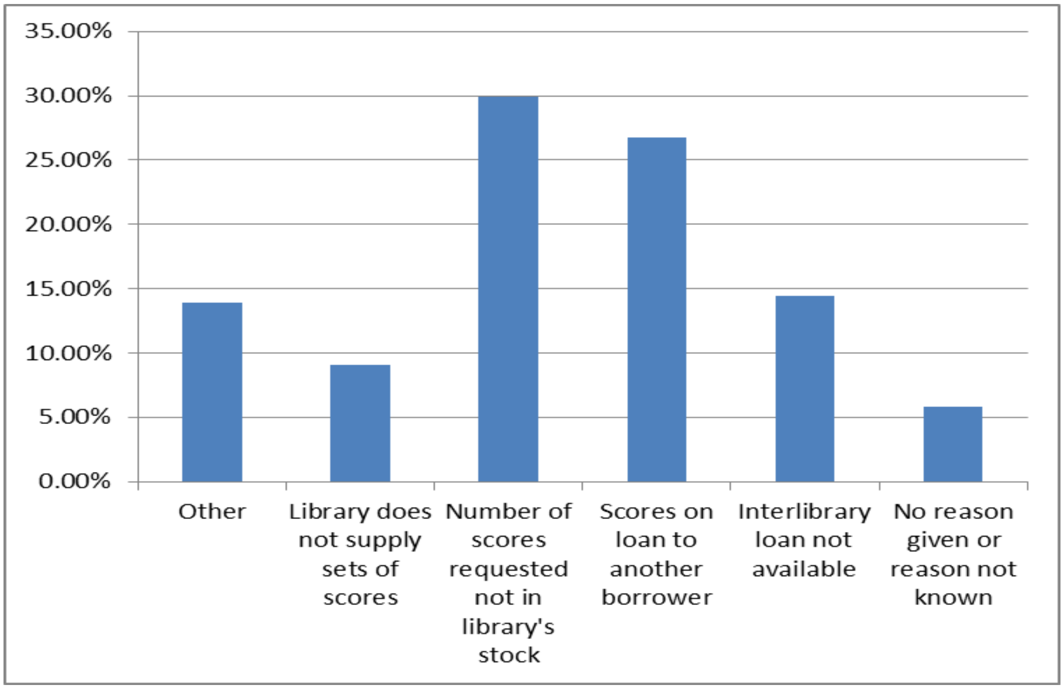
91% of performing groups always use the same musical director; 6% vary occasionally and only 3% vary their musical director regularly.

Music sourcing

This section only applies to performing groups.

45% of performing groups' music is sourced from music libraries, over 27% bought or hired from music publishers, and 27% bought or hired elsewhere.

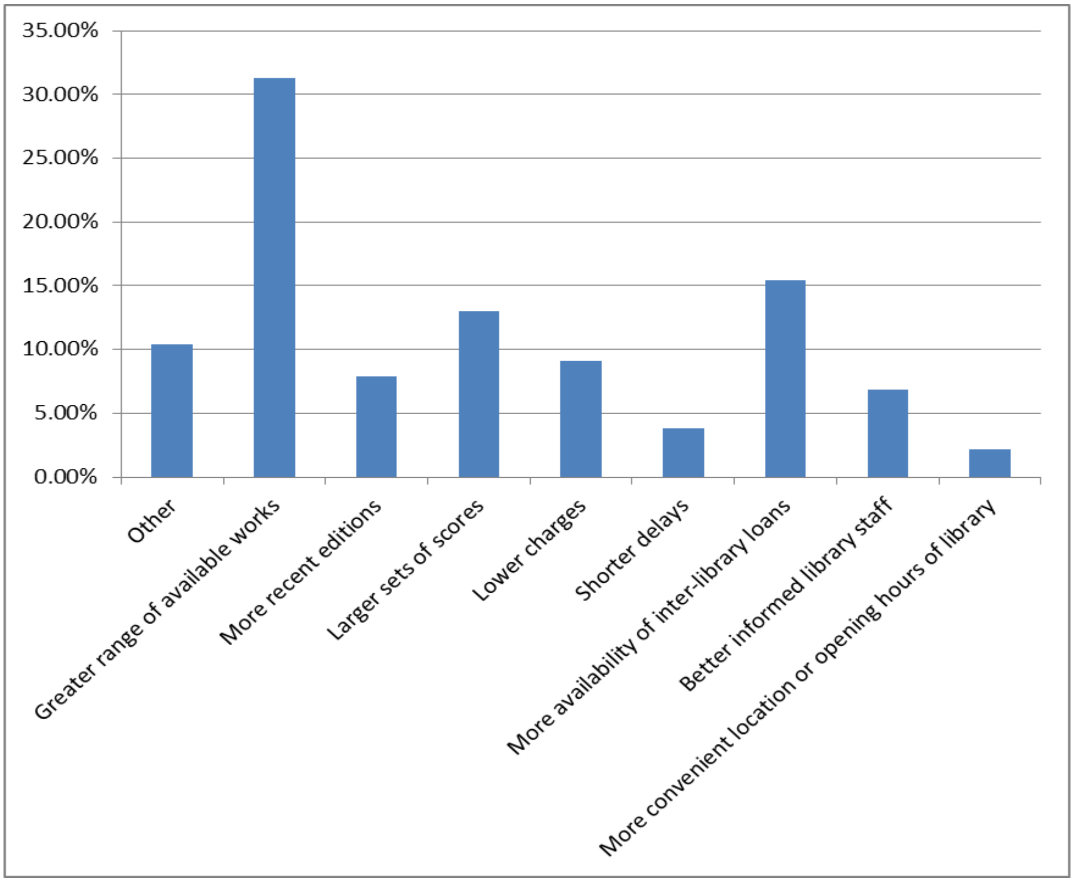
In 94% of cases, music libraries were able to offer the material requested by amateur groups. When they weren't able to do so, there were several reasons why not, with a worrying 15% stating they had been told that interlibrary loans were no longer available.



Where scores were offered, in 90% of cases a charge was made to the music group. While this was not asked in the questionnaire, a large number of respondents made it clear in their comments that they had no problem with the size of the charges which are overwhelmingly felt to be reasonable.

Charges were calculated on a different basis, depending on library and local authority: these included number of scores, length of work, duration of loan, reservation charge, interlibrary loan and annual subscription.

The following reasons could encourage a greater use of music libraries by amateur groups:



4) Our members as organisations

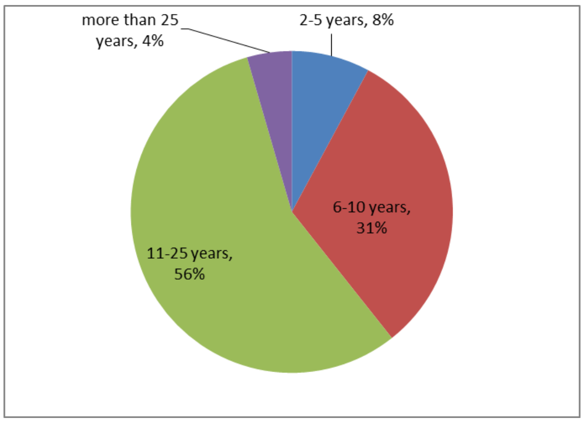
35% of our members have been in existence for more than 50 years, around 60% for between 6 and 50 years, and fewer than 10% are new in the last five years.

Membership of our members

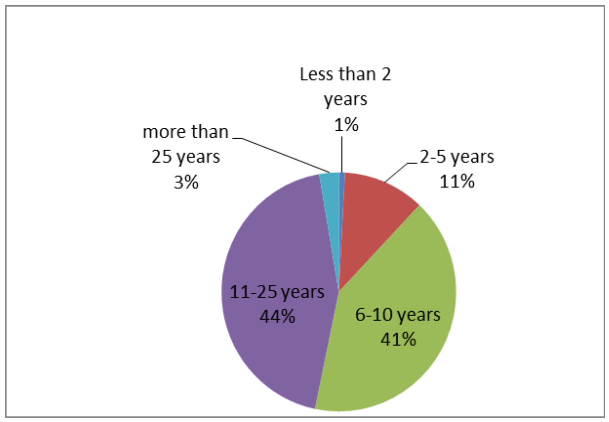
Between them, our members have around 170,000 members. *Performing groups' numbers seem relatively stable, but it appears that promoting groups have lost approximately 9% of their members since 2010.*

This membership is loyal, though there are differences between performing and promoting groups.

Promoting groups



Performing groups



However, while there may be a loyal core, this membership is not stable: although 60% only lose around 5% of their members each year, nearly 40% lose between 6-20% of their members on an annual basis. This requires a lot of ongoing replenishment of membership and raises questions about such high turnover.

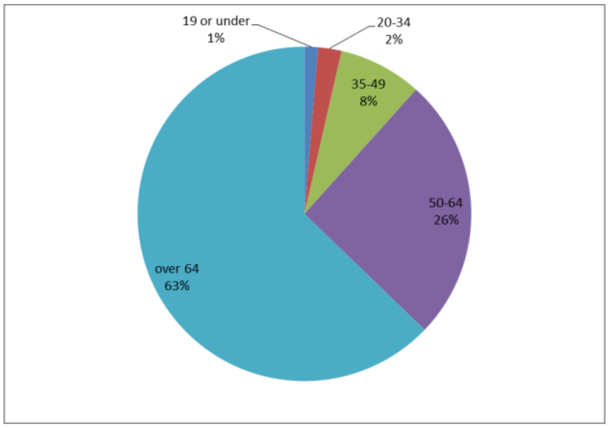
For performing groups, it is an improving picture compared to 2010, whereas it has slightly worsened for promoting groups.

Age profile

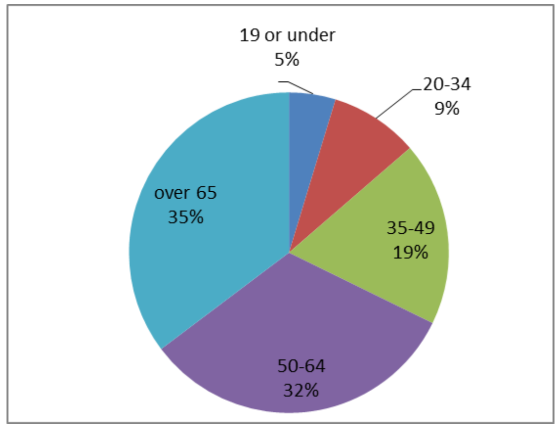
There's a difference in the age profile between promoting groups' and performing groups' memberships: while only a third of performers' members are over 64, nearly two thirds of promoters' members are.

But for both types of our groups there is a significant increase of members over the age of 64 compared to 2010.

Promoting groups' membership by age



Performing groups' membership by age



Performing groups identify 87% of their members as white (as against a census figure of 86% in the total population); promoters claim a 91% white membership.

As with audiences, around 7% of members' members consider themselves disabled. Performing groups are 64% female, promoting groups around 56%.

Access

For performing groups, 63% don't audition, 26% audition only once on entry, around 11% re-audition members regularly. *This represents an increase of non-auditioning, ie open access, groups since 2010 of around 6%.*