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**League of American Orchestras Releases
Orchestra Facts: 2006-2014
Organization's First Comprehensive Longitudinal Study of
Orchestra Finances and Operations Shows Field's Breadth, Vast
Community Reach, Lowering of Cost Barriers, Recession Recovery**

New York, NY (November 15, 2016) – The League of American Orchestras has released [*Orchestra Facts: 2006-2014*](#), the organization's first comprehensive longitudinal study of American orchestra finances and operations.

Using an extensive variety of organizational and external data sources, the study depicts the enormous breadth and scope of the American orchestra field, along with the complexities and resiliencies inherent in the art form's business model. With its focus on the nine-year period from 2006 to 2014, including topline trends, five-year trends, and one-year snapshots, *Orchestra Facts* examines the effects of the recent recession, as well as broader trends around audience attendance, orchestra finances, and accessibility.

"*Orchestra Facts: 2006-2014* reveals a remarkable breadth of activity and commitment of resources on the part of orchestras in service to their communities," said League of American Orchestras President and CEO Jesse Rosen. "Our first-ever longitudinal study provides an authoritative fact base for analyzing orchestras' finances and operations, as well as new metrics for understanding orchestras' education and community engagement activity."

The report finds that the **scope and scale of the orchestra field in the United States is vast**: in 2014, 1,224 orchestras contributed **\$1.8 billion to the U.S. economy** and attracted a **total audience of nearly 25 million**. Two out of every three orchestras operated with annual expenses budgets of **under \$300,000**.

NEWS

Cost barriers traditionally associated with attending orchestra performances are coming down: **the number of free concerts has increased, while the cost of purchasing paid-for tickets fell.**

An 18% growth in the number of households subscribing shows that **demand for subscriptions is still growing**, even if spend per subscriber is down. Overall, **audiences declined by 10.5%** between 2010 and 2014, broadly in line with other performing arts sectors. However, audiences for **classical series concerts declined by 5.5%** (corresponding roughly to a 3% decline in the number of classical series performances offered).

The report also finds that orchestras' work continues outside the concert hall through **a wide array of education and community engagement activities for diverse audiences.**

Generally, the report confirms **recession recovery** for the field as a whole, but **individual orchestras may have different experiences.** The study also illustrates the **complexity of the orchestra business model** as orchestras balance multiple forms of earned, contributed, and investment revenue.

Looking at Change in Unrestricted Net Assets (CUNA), defined as the difference between unrestricted income and total expenses, **the proportion of orchestras reporting deficits dropped from 40% in 2010 to 18% in 2014.**

Orchestra Facts: 2006-2014 was commissioned by the League of American Orchestras, with research conducted by Dr. Zannie Giraud Voss, director, Southern Methodist University National Center for Arts Research, and author of Theatre Communications Group's *Theatre Facts* report, and colleagues. The League's Dr. Karen Yair, vice president, Knowledge Center, was a co-author of the study.

This project was supported in part by an award from the *Research: Art Works* program at the National Endowment for the Arts: Grant #13-3800-7015.

Additional funding was provided by a generous grant from The Andrew W. Mellon Foundation, and by public funds from the New York City Department of Cultural Affairs in partnership with the City Council.

Report Highlights*:

*See report's *Key Findings* (pp 4-5) and *Conclusions* (p 20) sections for more details.

[Download the Full Report Here](#)

For the first time, this report publicly reveals a detailed picture of the **scope and scale of the orchestra field** in the United States:

- In 2014, the orchestra field contributed **\$1.8 billion to the U.S. economy** and attracted a total audience of **nearly 25 million**.
- That same year, there were **1,224 U.S. orchestras, distributed widely across all 50 states**, and two out of every three orchestras operated with **annual expenses budgets of under \$300,000**.

Orchestras perform, but also **teach, lead, facilitate, and train**.

- Their work drives a vast array of education and community engagement (EdCE) activities.
- A segment of the report analyzes survey responses from 98 orchestras EdCE activities: these 98 orchestras alone reported 19,000 EdCE performances, musical activities, and events, with 2.1 million people participating in these EdCE events.
- **Two thirds participated without charge.**
- **Thirty-eight percent of the EdCE participants were African American, Hispanic/Latino, Asian American/Pacific Islander, or American Indian/Alaskan Native.** Sixty-two percent were white.

Cost barriers traditionally associated with attending orchestra performances are coming down:

- Between 2010 and 2014, the number of free concerts increased, while the cost of purchasing paid-for tickets fell.

Orchestras find themselves at a moment of transition:

- 2013 saw a significant shift in the traditional orchestra business model as – for the first time – **income produced by single ticket and group sales was higher than that earned from subscription revenues.**
- The subscription model remains important: **an 18% growth in the number of households subscribing** shows that demand for subscriptions is still growing, even if spend per subscriber is down.

- Overall, **audiences declined by 10.5%** between 2010 and 2014, broadly in line with other performing arts sectors.
- However, **audiences for classical series concerts declined by 5.5%**, corresponding roughly to a 3% decline in the number of classical series performances offered.
- The **stability of contributed income through the recession years** and the **large number of small gifts** made to orchestras (around 75% of the gifts made by non-trustee individuals were under \$250) **indicate a broad base of continuing community support** for – and appreciation of – orchestras' work.

The orchestra business model is complex but resilient:

- Orchestras depend upon a complex portfolio of revenue sources that includes multiple forms of **earned, contributed, and investment income**.
- Orchestras **successfully maintained contributed income levels** through the recession while containing growth in expenses.
- **Many orchestras rely on investment income, though this makes them more vulnerable during leaner times.**
- Between 2006 and 2014, **total asset value increased by 4%** while **liabilities decreased by 7.5%**, having peaked at the recession's height. Consequently, **net assets grew at a rate exceeding inflation by 6.6%**.
- In general terms, these measures indicate **improved organizational stability over time**, despite the impact of recession on the field.
- Looking at Change in Unrestricted Net Assets (CUNA), defined as the difference between unrestricted income and total expenses, **the proportion of orchestras reporting deficits dropped from 40% in 2010 to 18% in 2014.**
- It's important to note that the report confirms recession recovery for the whole field; **individual orchestras may have different experiences.**

Methodologies:

The report's analysis incorporates a variety of data sets, including:

Southern Methodist University National Center for Arts Research (NCAR) Data:

- **Internal Revenue Service (IRS) Form 990 Data**
- **DataArts' Cultural Data Profile (CDP)**

League of American Orchestras Data:

- **Orchestra Statistical Report (OSR) Data**
- **Education and Community Engagement (EdCE) 2014 Survey Data (98 League member orchestras)**

The analyses draw from the combined NCAR and OSR data sets in two ways:

Orchestra Field-wide 2014 Snapshot: 1,224 orchestras in the NCAR and OSR data sets for financial year 2013-14

Orchestra Field 2006-14, 9-year Trends: The 547 orchestras with annual expenses of \$50,000 or more that submitted data each of the five financial years from 2005-06 to 2013-14

The OSR data set was also exclusively analyzed in the following two ways:

OSR2014 Snapshot: The 107 League member orchestras participating in the Orchestra Statistical Report for financial year 2013-14

OSR 2010-14, 5-year Trends: The 65 League member orchestras participating in the Orchestra Statistical Report for each of the five financial years from 2009-10 to 2013-14

Figures in the report are adjusted for inflation.

Orchestras surveyed include both professional and semi-professional orchestras, but do not include school, college, or military orchestras.

Youth orchestras are partially represented in the data sets, and are identified by footnotes throughout the report.

League of American Orchestras

The League of American Orchestras leads, supports, and champions America's orchestras and the vitality of the music they perform. Its diverse membership of more than 2,000 organizations and individuals across North America runs the gamut from world-renowned symphonies to community groups, from summer festivals to student and youth ensembles, from conservatories to libraries, from businesses serving orchestras to individuals who love symphonic music. The only national organization dedicated solely to the orchestral experience, the League is a nexus of knowledge and innovation, advocacy, and leadership advancement. Its conferences and events, award-winning Symphony magazine, website, and other publications inform people around the world about orchestral activity and developments. Founded in 1942 and chartered by Congress in 1962, the League links a national network of thousands of instrumentalists, conductors, managers and administrators, board members, volunteers, and business partners. Visit americanorchestras.org.

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