



ROYAL
PHILHARMONIC
ORCHESTRA

Insights Report 2020



Introduction

Focusing on what can be done – in a year when it mattered most

James Williams, Managing Director, Royal Philharmonic Orchestra

As the Royal Philharmonic Orchestra (RPO) approaches its seventy-fifth anniversary in 2021, 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. The RPO aims to put orchestral music at the heart of contemporary society, collaborating with creative partners to foster a deeper engagement with communities to ensure that orchestral music is accessible to as inclusive and diverse an audience as possible.

To support these goals, over the last three years the RPO has conducted nationwide consumer research to better understand the public's terms of engagement with the genre – possibly the most extensive archive of consumer insight on orchestral music in Britain today.

The results from successive phases of research suggest that a broad-based and resurgent interest in orchestral music is taking root across the UK – across geographical communities and across age groups. This popularity relates to the genre in its broadest form; film, video and computer game music is valued alongside the timeless repertoire of the great symphonic composers. Further, given the growth of streaming, downloading, and – more recently – online concerts, this combination of the old and the new presents the remit for orchestras in modern society. Here, the difference between the words 'classical' and 'orchestral' music becomes important. We believe as strongly as anyone that defining and exemplary performances of the symphonic masterworks are essential to the health of the genre. But there needs to be more: in the digital age, computer games and apps will increasingly become core elements in defining young people's relationship with any genre of music. To welcome people to the orchestral genre, we need to celebrate the importance of film, computer games, streaming, and musical theatre as signposts to a lifetime's journey of musical discovery.

These evolving trends became even more pronounced during 2020 – a year of human tragedy, of loss and suffering. Whilst the national lockdowns and social-distancing measures that resulted from the Covid pandemic broke the consumer's connection with live concert hall experiences, music lovers adapted during lockdown. During an unprecedented time of crisis and anxiety, music has become more important to people as an expression of hope – giving some the strength to endure and for others serving as a tonic to support their mental health and wellbeing.

This new insight report from the RPO shares highlights from our market research during an unprecedented year. At the time of writing, it is challenging to remember what life was like at the start of the year before the pandemic struck so savagely. Consequently, this report starts with the position before the pandemic, sharing the positive developments in terms of public engagement with orchestral music. We then examine the role music played to help people during lockdown, and how people were able to maintain a connection with music even when concert halls were closed. Beyond this, we share

some early viewpoints from consumers on what they think the world will look like after the pandemic – and the important role that music and the arts play. With Brexit on the horizon, our research also explored the public's perspective on the arts and the vital economic and cultural role they play for Britain's position on the world stage.

At the end of this report, we look forward and share details on the RPO's vision for 2021. The pandemic this year has threatened the very existence of the performing arts in Britain, both at a national and grassroots level. At the RPO, we have adapted to unprecedented events and focused on what can be done. Named the UK's hardest working orchestra, the RPO has lived up to its reputation by adapting, innovating and keeping the public engaged with music – moving forward despite uncertainty and restrictions. We were the first orchestra to return to the recording studio this summer, and we organised several evening concerts online for those missing the concert hall experience. In addition to employing digital channels to engage with audiences – and partnering with Deezer and the BPI to share collective insights – we have never lost touch with the importance of human interaction and the magic of live performance. In September, 38 of our musicians made the RPO's first public appearance at our new home, Wembley Park, and we followed this with a lunchtime concert series at Cadogan Hall, a project that was hugely successful in fully complying with social-distancing and Covid safety measures.

The work we have done demonstrates our tireless determination to give people access to live and recorded performances at a time when the healing power of music is most cherished. We would also like to thank the UK Government for initiating the Culture Recovery Fund of which the Orchestra is a beneficiary: a move that helps some of our plans for 2021, in terms of community engagement around the UK, education work, concerts and further innovations on digital platforms.

As our new insight report will demonstrate, the capacity of a leading orchestra to move forward is important precisely because the art, the excitement of live performance, and the wellbeing it supports is needed. Orchestral music has helped people of all ages to cope during the prolonged periods of lockdown, and our ability to enrich communities and deliver cultural nourishment is part of our national recovery from the pandemic and its far-reaching impact on communities across the UK. As attention turns to rebuilding the country in 2021, music will continue to have a vital role to play in helping people re-engage with society, friends, and their work routine – whether this be listening to recorded music, attending a concert or, indeed, the joy of mastering a musical instrument.

This report is a sobering reflection on a society coping with a crisis – but it is also a celebration of the enduring power of music to enrich, to support, and to unite people.

Methodology

The insight shared in this report forms part of the national listening exercise the RPO has been conducting over the last three years. This research presents an opportunity for the orchestra to better understand public sentiment towards – and terms of engagement with – orchestral music. This national polling exercise, coupled with the anecdotal feedback our players get from meeting thousands of people every year after concerts, helps guide our thinking on how we can enrich people's lives. In the digital age of two-way communications, we believe the ensemble for the modern age needs to be a listening orchestra.

Our research was conducted by Maru Blue, polling a nationally representative sample of more than 8,000 adults over a nine-month period: before the pandemic, during the first lockdown, the summer, and then in November 2020. In some instances, findings were compared to benchmark research from previous years.

The surveys were carried out online.

Chapter 1

Before the storm:

The resurgence of orchestral music in modern Britain

Before exploring how the pandemic re-shaped consumer engagement with music, we must consider the context. Prior to the world-changing events of 2020, orchestral music was entering a new golden age in the UK. Increasing numbers of young people were discovering the genre, film and video game soundtracks were broadening the genre's reach, and the live music scene was flourishing. The RPO enjoyed record years in terms of the number of concerts played, new countries visited, and attendance levels at concert halls. Topping this, the RPO put orchestral music at the top of the Official Album Charts for two successive Christmas holidays.

These trends, which we saw and experienced first-hand, were reflected in the consumer research we conducted in the two years prior to March 2020.

In this opening chapter, we will recap some of the key trends that emerged from our research before Covid hit the UK. Looking back over the previous 18 months, the data present a clear and positive picture of resurgent interest in orchestral music. Presentation of the genre in its broadest form was appealing to people from all UK regions, and young people were discovering orchestral music for the first time.

Orchestral music tops the discovery list for 2020

In January 2020, the RPO commissioned new research that looked at the relative popularity of a range of music genres and the public's appetite to discover something new in the year ahead.

The genre that intrigued the British public the most was orchestral music. At the start of 2020, more than a third of adults (35%) said they would be interested to learn more about orchestral music – a sharp rise from 22% in 2018. Significantly, this resurgent interest in orchestra music was led by younger people, with one in four people under 35 (26%) stating they were interested in discovering more about orchestral music in 2020.

Whilst rock and pop also featured highly as genres and sub-genres people wanted to explore in 2020, the overarching appeal of orchestral music was accompanied by heightened interest in opera – with more than one in five people saying they wanted to explore this in the year ahead.

Technology has played a big role in helping orchestral music reach a new and younger audience. Streaming, downloading, and use of mobile apps have enabled more people to engage with music, and the ease and immediacy of access nurture a spirit of discovery and experimentation.



	2018	2020
Orchestral/classical music	22%	35%
Rock	21%	29%
Pop	15%	24%
Opera	12%	21%
Country	14%	21%
Folk	15%	20%
Dance	10%	15%
R&B	13%	15%
Heavy Metal	9%	13%
Rap	9%	9%

Table: Music genres people would like to discover or learn more about in 2020

Orchestral music becomes part of everyday life

Whilst the concert hall remained the keystone for the full orchestral experience, our research at the start of the year also suggested that more people were engaging with the genre as they were carrying out everyday tasks. This does not trivialise the genre; rather, it attributes comfort and everyday warmth towards the orchestral form – which goes some way to explain why, when lockdown started, people naturally turned to online concerts, radio, and classical recordings to help them through the long days of home isolation.

In 2018, our research suggested that a third of people were choosing to listen to orchestral music on the move, while driving or as a passenger. By 2020, this had risen to two in five [41%]. By the start of 2020, people were as likely to listen to orchestral music while doing the housework as they were to visit a concert hall.

Over the two-year period, there were also sharp rises in the proportion of people that listened to the genre while working (up from 8% to 19% in two years), when cooking (23%), while pottering in the garden (12%) – or relaxing in the bath (17%). Together, these findings show how, for many people, orchestral music was becoming the chosen soundtrack to their daily routines. Some people started and finished their day with the genre. One in five people said they listened to orchestral music at bedtime as they went to sleep – and half of those people turned it back on again as they got up in the morning.

An understanding of people’s everyday encounters with orchestral music underlines its relevance to daily life, whether through popular film soundtracks, computer game music, or the great masterworks. 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.

	2018	2020
 Whilst travelling (e.g. in a car, public transport etc.)	30%	41%
 When doing housework	19%	27%
 In a concert hall	25%	27%
 While reading	15%	25%
 When cooking	14%	23%
 While going to sleep	9%	19%
 When working	8%	19%
 When in the bath	8%	17%
 When hosting a dinner party	5%	15%
 When in the garden	5%	12%
 While exercising	5%	11%
 To wake me up in the morning	4%	9%
 While making love	2%	7%
 Other	6%	5%

Table: Everyday situations when people listen to orchestral music

The type of orchestral concert people would consider attending

The everyday popularity of orchestral music at home or on the move translated into people wanting to have the concert hall experience. When people were asked whether they would consider attending a live orchestral concert of any sort at some point in the future, an emphatic 94% of adults said they would. Significantly, this view was consistent across all age groups, regions, and demographics.

The type of concert people said they would choose varied by age group. Whilst the older audience favoured concerts featuring a traditional repertoire, the under-25 audience was twice as likely to consider attending a concert featuring crossover music or soundtracks from films. Meanwhile, hits from popular musicals appealed to families, and concerts featuring computer game music appealed most to the under 35s.

Here, again, the distinction between orchestral and classical music is important. Domestic experiences of the orchestral genre in recorded form at home point towards an interest in the concert hall: to cultivate a new and broader audience, the genre needs to be presented in the broadest form possible. This is what makes the genre inclusive – and it is what gives the genre a future.

Concluding remarks

It was very encouraging to see that, at the start of 2020, orchestral music had become a mainstream music choice for people of all ages, regions and backgrounds – whether it be the soundtrack to a car journey, a dinner party, an afternoon in the garden or the music of choice to relax to after a long day at work. In the months that followed this study, the world changed as everyone reacted to Covid, the shock of a nationwide lockdown, and long periods of home isolation. In the dark months that followed, music became an essential part of the day, helping many people to get through the era of home isolation. Radio listenership, streaming, and music sales all rose, and orchestral music had an important role to play. The groundwork done over the previous years to reconnect new audiences with the genre meant it was there to help more people during the challenging pandemic months when it mattered most.”

—Huw Davies, Deputy Managing Director | Royal Philharmonic Orchestra

Orchestral music: Engagement before lockdown 2020



The desire to learn more about different genres was on the increase:
The proportion of people that said they wanted to learn more about particular genres increased since 2018, particularly among younger people.



The most popular genre to explore was orchestral music:
A third of people said they would be interested to learn more about orchestral music.



Orchestral music increasingly became part of everyday life:
41% listened to it in the car, 27% while doing housework, and 25% while reading.



Strong interest in the live concert experience:
94% of adults said would consider going to an orchestral concert.

Northern Trust is proud to support the Royal Philharmonic Orchestra. Since our collaboration first began in 2013, we have seen the work of the Orchestra continue to evolve, and this has never been more transformational than in 2020.

As the world adapted to the challenges of the global pandemic, the Royal Philharmonic Orchestra continued to inspire, through programmes such as #RPOatHome. This digital delivery of music not only showcased the transcending power of music in challenging times, but created an increased accessibility for many more people, who thanks to technology, could now access performances – perhaps for the first time.

Northern Trust commends the Orchestra on its ability to bring the healing power of music to the communities in which we live and work, at a time we all need it the most.

—Teresa Parker, President, EMEA | Northern Trust

Chapter 2

Orchestral music during national lockdown

In March 2020, life in the UK changed overnight. The nation went into a national lockdown, as all eyes focused on the National Health Service heroes working round the clock to save lives. The loss of life was a national tragedy, and the seismic economic impact is yet to be fully understood.

Across the country, performing arts organisations were profoundly affected: venues remained closed for months; entire concert seasons were cancelled; and people lost their jobs. Social distancing changed valued aspects of life we had come to take for granted, and the 'new normal' may last for some years to come.

Whilst the industry picture has been well documented, our research during lockdown gave us an invaluable opportunity to understand the public's sense of engagement with the arts music during the first period of lockdown and home isolation

Adapting to lockdown forced people to change their routines. There was a focus on what could be done, a break from fast-paced lives, and, for some, a return to enjoying – or re-discovering - simple pleasures. Home isolation was, for many, a dark and challenging time, but adversity bred tenacity, encouraging people to adapt and to cope – and music played a vital role in giving people cultural enrichment and escapism in a time of desperate need.

Time – and the opportunity to learn

Lockdown meant many households now had time on their hands. As people adjusted to a very different lifestyle, music helped people get through the long days of home isolation.

Despite a sharp decrease in car use, RAJAR (Radio Joint Audience Research) found that almost a third of people said they were listening to more radio, with people listening for far longer periods. The BBC, too, saw a weekly audience of 3.4 million users across its Sounds app during the early months of lockdown, with a record 136 million plays of on-demand radio programmes.

When it came to learning about new music, our own research found that six in seven people (85%) said they were actively broadening their horizons with extra time on their hands, with a third of these saying they wanted to learn more about orchestral music, opera, and chamber music.

Genre	Total
Rock	35%
Current Pop	32%
Orchestral	25%
Country	21%
Musicals	19%
Dance/house	17%
Rap/Hip hop	16%
Reggae	16%
Indie	15%
Soul/funk	15%
Folk	14%
Heavy metal	14%
Jazz	12%
Other	6%

While those over 65 were the most likely to immerse themselves in orchestral music (35%), one in five people under 35 (19%) said they too were using the time to learn more about the genre.

Fulfilling an interest in performing arts

During isolation, engagement didn't stop at simply listening to more music. With venues closed, three in five people (59%) said they were looking for new ways to positively fulfil their interest in the performing arts. This rose to 74% among the under-35 age group.

The findings here are significant: the range of ways people set out learning more about orchestral music during lockdown is a measure of serious interest. Around one in five people set out to learn more about the genre through TV/online documentaries about the arts (22%), by reading up on the subject (20%), or following podcasts (19%). A further 17% said they had turned to social media to watch performances or interviews, or artists or soloists broadcasting from their homes – and 15% had followed this up by exploring the websites of the arts organisations they were interested in.

The RPO, like many ensembles, noticed a spike in online interest during lockdown and used online and social channels to maintain an engaging dialogue with its followers. Activity here included some concert performances aired on YouTube, carefully curated during the evenings to give concertgoers the sense of occasion, of going to a live performance. During the lockdown months, the RPO experienced a 290% increase in website visitors and a 755% increase in social media engagement.

Researching, listening to, and watching orchestral performances during lockdown gave people an enriching creative stimulus, a positive tonic to counterbalance long days of home lockdown and anxiety about jobs, elderly parents, and other loved ones.

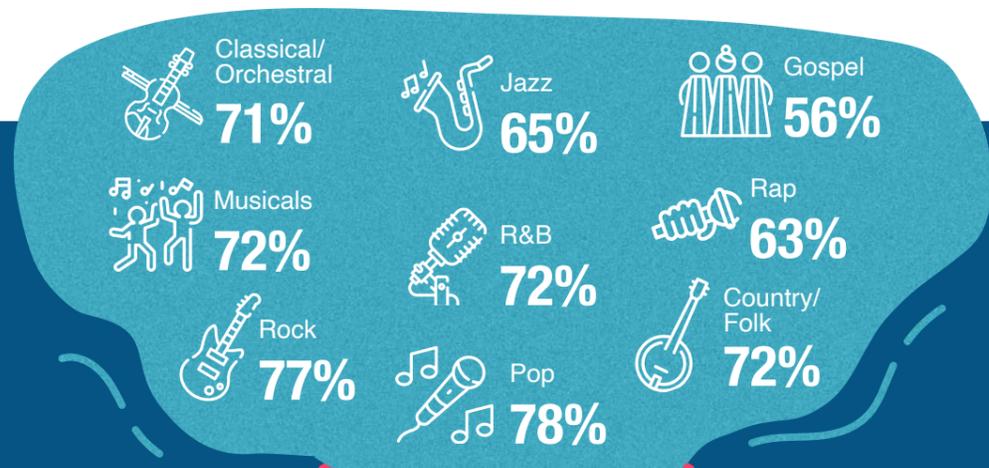
Our lockdown research suggested that some people took their enthusiasm for music a step further and actually devoted time to playing music themselves. Overall, 14% of the people, who were keen to spend more time exploring music, decided lockdown was a good time to learn an instrument, with 10% taking online classes. Again, this trend was something the RPO experienced first-hand: with a surge in visitors to our website and social media channels engaging with our online concerts, clips and interviews. Education has always been a keystone of the RPO's far-reaching community work, and during lockdown its players were actively helping others improve their musical skills through the Internet.

Lockdown and wellbeing

From the consumer's perspective, orchestral music provided comfort during a time of unprecedented stress and anxiety. This was also a reason why the genre had a particular appeal to younger people, those discovering the genre for the first time.

In order to get a sense of the different qualities people were looking for in each genre, and the reasons they were choosing to listen to particular music during this time, we asked samples of regular listeners of each genre to describe the effect listening had on their mood.

The research found that seven in ten (71%) people who listened to orchestral music during isolation cited tangible and lasting positive impacts on their mood and wellbeing. A third of respondents (35%) said orchestral music helped them to relax and maintain a sense of calmness and wellbeing. Additionally, 18% of respondents said orchestral music lifted their mood, with a further 14% saying it had helped their productivity and concentration on work and studies.



The percentage of people that said different genres had a tangible impact on their mood and wellbeing

	Orchestral	Pop	Rock	Gospel	Jazz	Country/ folk	Musicals	R&B	Rap
Helped you relax and maintain a sense of calmness and wellbeing	35%	22%	20%	18%	21%	28%	21%	20%	12%
Inspired you and lifted your spirits	18%	32%	30%	18%	14%	17%	25%	22%	20%
Good genres to work or study to productively while at home	14%	14%	14%	12%	14%	11%	11%	13%	15%

Children spend more time learning musical instruments during lockdown

The impact of schools being closed, face-to-face music lessons ceasing, and clubs and activities stopping was a concern. While online classes and home-schooling kept the wheels turning, estimates suggest over 700 million days of education have been lost this school year.

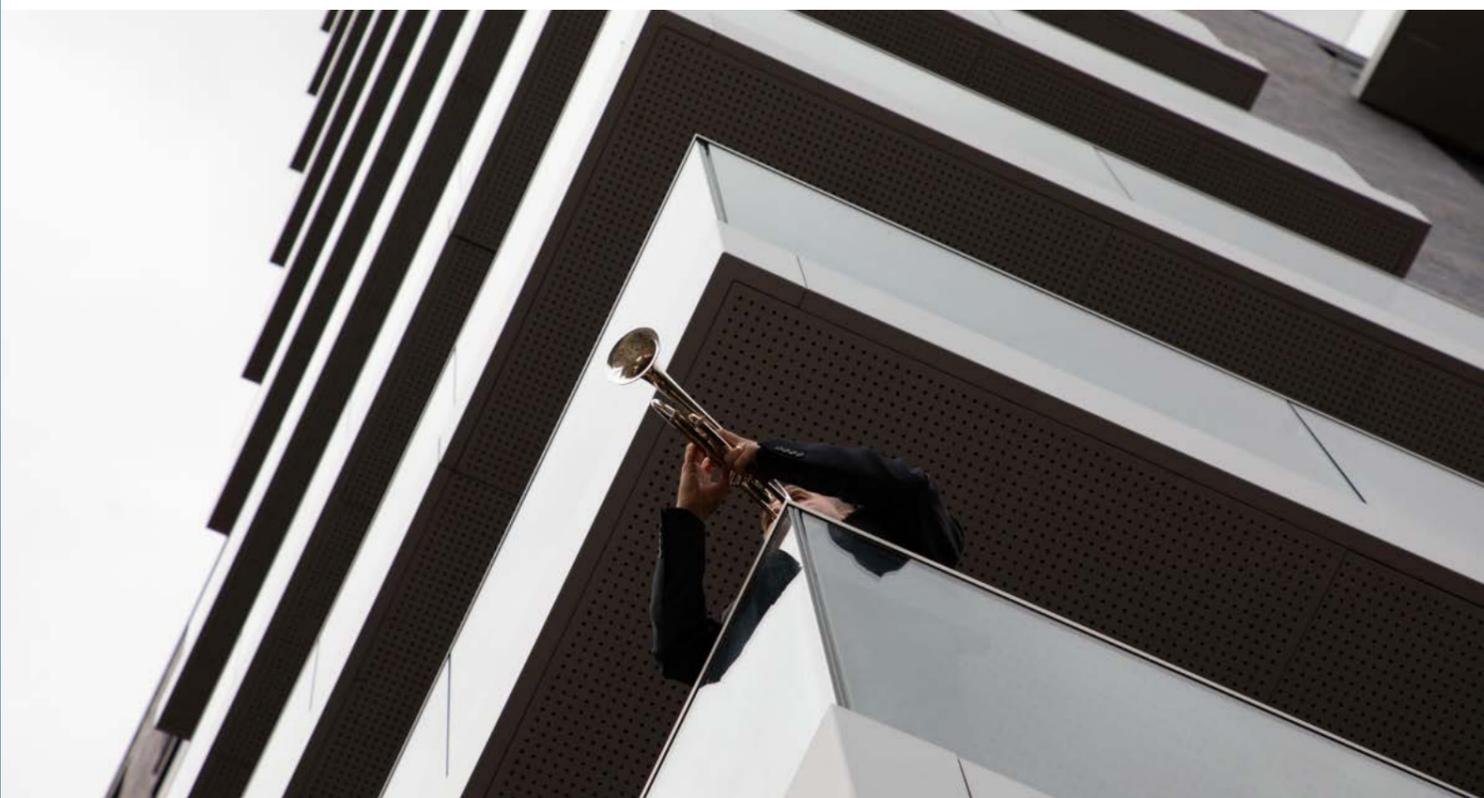
But, musical engagement amongst children did not stop altogether.

Two thirds of parents (66%) with children who were learning to play a musical instrument said their child had done more music practice since lockdown started.

More than half (51%) said their children had practiced for around an extra hour each week. One in seven children (15%) had done an extra half hour of practice every day, with 3% saying they had done an extra hour each day.

Life in lockdown: Key facts

- The extra time at home during lockdown was used productively: six in seven people (85%) said they actively broadened their cultural horizons, with a third of these saying they wanted to learn more about orchestral, opera and chamber music.
- Going beyond recorded music: 59% said they were looking for ways to positively fulfil their interest in the performing arts.
- Music had a positive impact on health and wellbeing: seven in ten (71%) people that listened to orchestral music during isolation cited tangible and lasting positive impacts on their mood and wellbeing.
- Learning a musical instrument: 66% said their child had been doing more music practice since lockdown started.



During this year of unprecedented discord experienced across the world as a result of the COVID-19 pandemic, the powerful and positive influence of orchestral music on people's lives and wellbeing is so important. The tireless energy, creativity and innovation shown by the RPO to continue to bring its music for the benefit and enjoyment of others, even in these restricting and challenging times, is commendable. At St. James's Place we are very proud to be a corporate partner of the RPO.

—Claire Blackwell - Marketing Director | St. James's Place Wealth Management

Chapter 3

Summer 2020: Emerging from lockdown

As the country re-emerged from a state of near paralysis from the spring months of lockdown, many talked about life in the 'new normal' – an assumption at the time that the country would continue to operate with limited restrictions and social distancing.

However, the world kept changing in the months that followed – and the only certainty of 2020 has been living with further uncertainty.

Social distancing was relaxed during the high summer, but life was still far from normal. Children were not breaking up for summer having been home schooled for months. Many families stayed in the UK during the summer holiday season, and the travel sector suffered from cancellations, quarantine rules, and shattered consumer confidence. Despite Government incentives for people to eat out, big names left the high street. And millions of people remained on furlough.

The performing arts industry was at crisis point. Theatres and music venues had been closed for months; musicians struggled to make a living with no work; and the live music scene was largely unsuccessful at finding different ways financially viable models to put on shows performances that followed the UK government's health guidelines.

The RPO focused on what could be done despite the hugely challenging context. During the summer months, the ensemble returned to the recording studio, launched some online concerts, and prepared for its first public appearance at its new home in Wembley Park.

Despite the perceived challenges at the time, worse was to come in the autumn as Covid numbers rose and a second national lockdown was announced. Clearly, there never was a 'new normal' – just a sequence of abrupt changes.

During the summer period of re-emergence from lockdown, the RPO commissioned another cycle of research to gain a detailed understanding of the public's mood and what, if any, role music played in their lives. Doing a further piece of research was significant. The contrast to research results from lockdown would tell us a lot about whether attitudes to music during lockdown were a momentary reaction – or whether something more substantial and sustained was shaping consumer views on music.

Music discovery continues with young people

As people re-emerged from the first national lockdown, one in six people (16%) said they intended to continue exploring the music that they had discovered during lockdown – with 12% saying they would continue listening to specialist music radio stations. In both cases, interest in continuing a journey of discovery was strongest among young people – with 24% saying they would continue exploring the music that they had discovered during lockdown. Significantly, one in five younger people (20%) said they would continue the lockdown habit of watching streamed concerts online.

Returning to the concert hall

Whilst people looked forward to doing the things they had missed during lockdown, there was an overriding sense of caution when it came to maintaining personal safety, particularly among those who had avoided contracting the virus. During the summer holiday season, safety overtook price for the first time as the top priority for holiday-makers. Similarly, many concertgoers expressed concerns about protecting their personal safety at live music events.

In June, The Guardian reported on a study by the Music Venue Trust, which found that just 36% of the British public would feel safe returning to live gigs performances during the Covid-19 crisis. However, safety requires investment: in the classical music sector, an open letter was sent to the Government signed by representatives from the Musicians' Union, BPI, PRS for Music and others, arguing that "opening at 30% capacity under social distancing will not work without huge subsidy."

For the RPO's summer research, we asked a sample of concert goers how soon, after lockdown restrictions had been lifted, they would feel comfortable attending a live music event. 48% said it would be at least six months to a year before they felt comfortable. 29% of those aged over 55 – a key demographic for orchestral music – felt the wait would likely be up to 12 months.

	Total	18-34 (Net)	35-54 (Net)	55+ (Net)	Male	Female
As soon as I possibly can	17%	18%	15%	10%	19%	11%
Within a month	13%	17%	10%	13%	15%	11%
Within 3 months	25%	24%	23%	23%	21%	27%
Within 6 months	25%	23%	27%	26%	25%	24%
Within a year	23%	18%	23%	29%	17%	27%

Table: Timescale for returning to the concert hall

Plans to Support the Performing Arts

The latest data from the Office for National Statistics suggest the arts and entertainment industries have been hit harder by the pandemic than other areas of the economy. Grants from the Cultural Recovery Fund have gone some way to support some organisations through the winter months.

Whilst the crisis facing the arts has been well documented in the media, public support for the arts has received less attention. Our research during the summer indicated a groundswell of empathy and support from the public for the arts, with many people willing to make donations if they were able to do so. Overall, 43% of people said they would, in one form or another, be prepared to support arts organisations to help them make up for lost income.

Surprisingly, younger people were the most willing to step forward and help. In fact, under 35s were over two and a half times more likely to say they planned to support an arts organisation than those aged over 55 (64% vs 25%).

Aside from attending events, and facing the potential risks attendance might bring,

those under 35 were almost three times as likely to say they would make a donation (13% vs 5%) and were four times as likely to become a 'friend' or member of an organisation (12% vs 3%). Further, one in four (23%) vowed to attend more events than they would normally have done – twice the proportion of over 55s (9%).

Among those who described themselves as fans of classical music or opera, just over half (51%) felt inclined to help out financially.

The research findings from the summer present a mixed picture – unsurprisingly, given the context of the time. The country was re-emerging from lockdown, keen to get on with life, but still under a cloud of caution and uncertainty.

Whilst people remain cautious about rushing back to the concert hall, underlining the financial challenge facing venues and ensembles, the willingness of many people to support arts organisations financially reflects the importance they attach to culture and the role the arts play in society. Perhaps, too, their willingness shows appreciation for the role music played in helping many through the dark days of lockdown.

Making concerts safe again

The RPO research also asked people about the possible conditions and facilities that would encourage them to return to restaurants, pubs, cinemas, and concert venues. Even when Government guidance was followed – with hand sanitiser, reduced capacity, and social-distancing measures – the results suggest that one in seven (15%) people would not return to concert venues, pubs, restaurants, or cinemas while the COVID pandemic existed. Among those over 55, this proportion rose to almost one in five (18%).

	Total	18-34 (Net)	35-54 (Net)	55+ (Net)
Hand sanitizer units regularly available	50%	48%	48%	52%
Less people admitted into the restaurant/pub/cinema/concert hall	46%	37%	45%	55%
Knowing that the restaurant/pub/cinema/concert hall has revised its hygiene policy	42%	43%	38%	47%
Social distancing markers in box office and bar areas	35%	32%	34%	37%
Prominent social distancing awareness posters within the restaurant/pub/cinema/concert hall	33%	33%	32%	34%
Regular spacing between audience members and unreserved seating within the auditorium	33%	32%	31%	35%
Less covers permitted within a restaurant space	32%	19%	31%	43%
Shorter concert programmes	5%	9%	5%	2%
Other	4%	2%	4%	5%
Nothing would encourage me do these things again	15%	10%	15%	18%

Table: Things that would make people feel confident about going out again

Coming out of lockdown: Key Facts

16%

Lockdown discovery was set to continue: One in six people (16%) said they intended to continue exploring the music they discovered during lockdown.

48%

Live music - enthusiasm mixed with caution: One in two hope to return to the concert hall before the spring. In contrast, 48% felt it would be at least six months to a year before they would feel comfortable going to a concert.

43%

Supporting the recovery: 43% of people said they would in one form or another, like to help arts organisations make up for lost income.

UNDER
35s

A new generation of supporters: The under 35 age group were around three times as likely as over 55s to say they would make a donation to support arts organisations – or to become a ‘friend’ or member of an arts organisation.

Culture and the Arts bring meaning to our lives. Culture and the 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 crisis will be the very things that will also help us to rebuild society in the months ahead.”

—Vasily Petrenko, Music Director Designate | Royal Philharmonic Orchestra

Despite all the challenges of 2020, the Royal Albert Hall has continued its much valued partnership with the Royal Philharmonic Orchestra, including performing in the Hall’s 2020 Christmas Festival season of live concerts. We continue with confidence and optimism to plan performances from the RPO into our 150th celebrations across 2021 and 2022, in the firm belief that live music has a vital role to play in rebuilding our communities post-Covid.

—Craig Hassall, Chief Executive Officer | Royal Albert Hall

Chapter 4

Winter, Christmas, and hopes of vaccination

In November 2020, a second national lockdown was announced to protect the population and to prevent the NHS from being overrun during the winter months.

Despite concerns over the economic and health impact of a second lockdown – and the prospect of a very different Christmas for 2020 – positive news emerged about vaccines. The UK Government was confident that some of the most at-risk groups could be vaccinated before Christmas, and most of the over 50s before Spring 2021.

Positive news of vaccine trials gave a basis for hope and, importantly for businesses and arts organisations, a sense of when life might start to move towards normality.

In late November, following news that the second national lockdown would end on 2 December, the RPO conducted its final consumer survey of 2020. This new study explored the role orchestral music might play in people’s lives over the festive period and assessed how news of a vaccine affected people’s plans to re-engage with social and cultural activities in 2021.

An orchestral Christmas

As the country returned to three-tiers of restrictions, many people accepted that Christmas 2020 would be quite different – with the Prime Minister describing the festive period as a “jolly careful Christmas.” Traditional pastimes such as visiting relatives, carol concerts, school plays, ice skating and even Christmas shopping trips were practically off limits for many.

The research revealed that, despite the looming limitations, orchestral music had a key role to play over the Christmas period. Nationally, 59% of adults said they would be listening to orchestral music, and, building on the trend from the first national lockdown, younger people were the most enthusiastic about the genre.



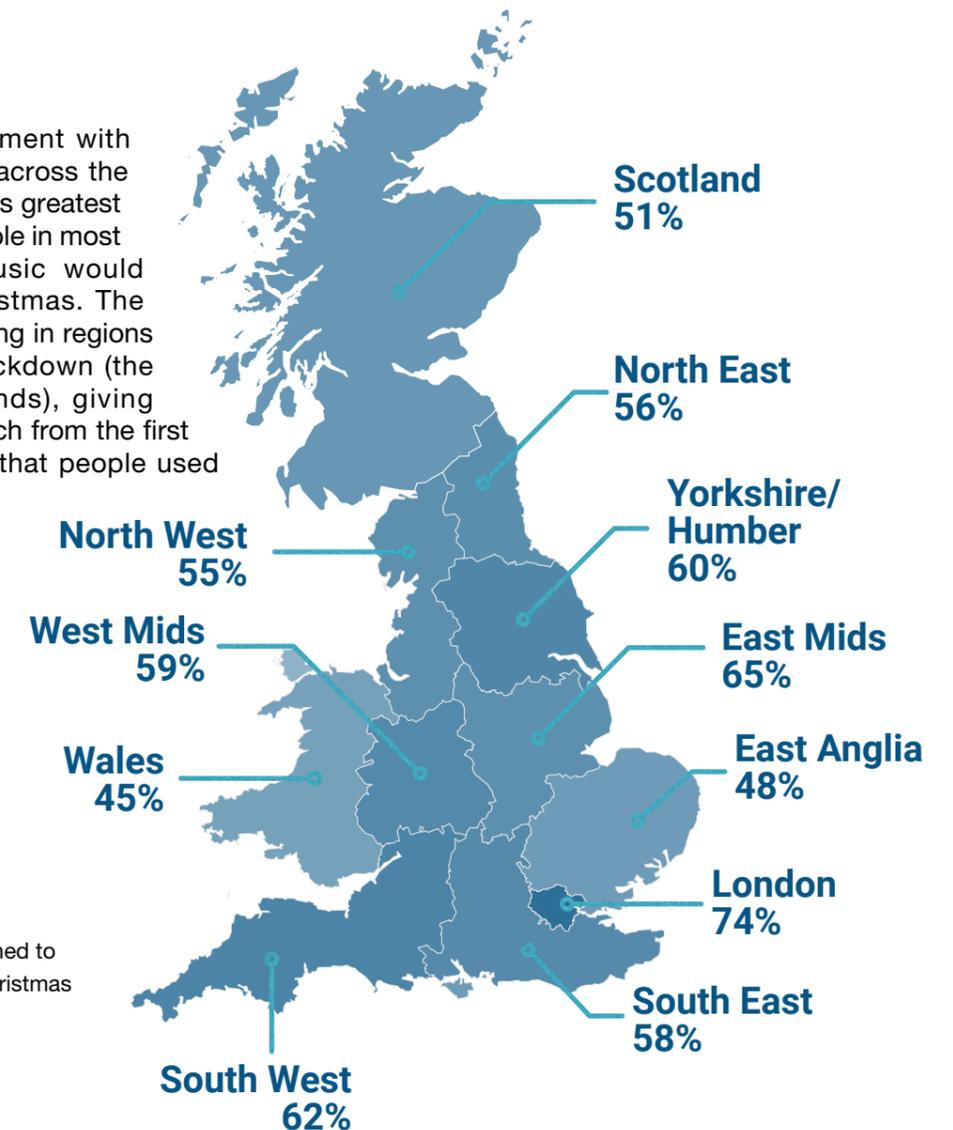
Chart: Percentage of people that planned to listen to orchestral music over the Christmas period

Whilst older people (those aged over 55) were those most likely to say they would enjoy Christmas carols at home (33%) or listen to orchestral music on the radio (20%) – young people led the way when it came to enjoying the orchestral genre in a range of other ways.

Under 35s this Christmas were most likely to say they would:

- Watch concerts or documentaries on YouTube (15%)
- Add orchestral music to their streaming playlists (15%)
- Stream an orchestral concert online via YouTube (12%)
- Enjoy orchestral music whilst playing computer games (12%)
- Buy vinyl or CDs as presents for people in the household (12%)
- Learn or improve skills playing a music instrumental at home (11%)

Regionally, planned engagement with orchestral music was strong across the country. Whilst enthusiasm was greatest in London, the majority of people in most regions said orchestral music would feature as part of their Christmas. The response was particularly strong in regions hardest hit by protracted lockdown (the North East and East Midlands), giving further credence to the research from the first lockdown, which suggested that people used periods of home isolation to explore and discover new genres of music.



Map: Percentage of people that planned to listen to orchestral music over the Christmas period

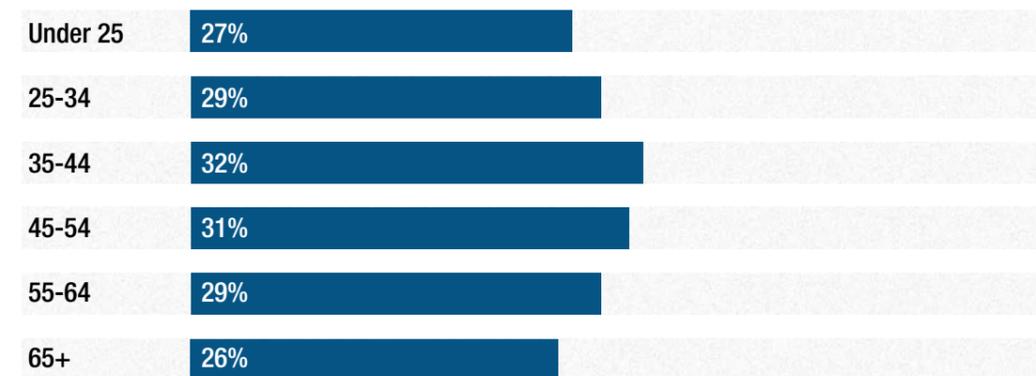
Life after the vaccine

The new RPO research suggests that news of a vaccine has given many people reason to believe that life will start to return to normal in 2021. Overall, 83% of those surveyed said news of the vaccine made them more comfortable considering a range of social activities for 2021.

Travel topped the list: this was not surprising given it is the most tangible expression of freedom of movement, the very thing taken away from people in 2020. Overall, 55% of people said they were now comfortable planning an overseas holiday for 2021, and 42% would now feel comfortable going to a hotel.

There was welcome news from the survey for concert venues following a devastating 2020. Nationally, the vaccine news meant that 29% of people said they would now feel comfortable going to concerts again, with 31% sure they could return to theatres and 21% putting musical festivals back on the agenda for 2021.

Reassuringly for music venues, the resurging confidence of live music audiences was evident across age groups.



Overall, people were more likely to feel comfortable returning to concerts in 2021 than they were sports matches (24%).



“Our partnership with the RPO started with a shared ambition to think differently about what culture and entertainment can bring to a neighbourhood. Wembley Park is famous internationally for its iconic venues, and hosting world-class performers across music, sport and entertainment. As we have transformed the area into a thriving neighbourhood, with culture at its heart, we’ve worked to bring this into the streets and public realm, presenting many hundreds of hours of free entertainment and culture throughout the year. Since the arrival of the pandemic, and the closure of venues large and small across the UK, this has continued, including presenting pop-up appearances from members of the RPO. The positive response these performances have had from shoppers, residents and visitors — in the heart of our young, diverse borough — has been immediate and heartfelt. At a time when many have faced real challenges in their lives, the thrill and emotional resonance of live music makes a real impact. Whether they know it or not at first, they have stumbled upon a chance performance by some of the world’s leading classical musicians, and that encounter stays with them. Wembley Park is all about extraordinary experiences, everyday — and that’s what the RPO performances have delivered at volume.”

— James Saunders, Chief Executive Officer | Quintain

Conclusion

For many, 2020 has been a year to forget. A year of tragedy, disruption and anxiety. A time of hardship, suffering and of loss.

Whilst every person has come face-to-face with their mortality – and every business has been made aware of its fragility – 2020 has also presented a unique opportunity to learn. There is an opportunity when we overcome Covid, which we will, to build a better world.

The RPO, like many arts organisations, faced a potentially catastrophic year, but since the summer we have focused on what is possible, refusing to grumble about what simply cannot happen. Before Covid struck, our vision was to create a truly modern orchestra that better reflected the needs and issues of modern society. Having been through the bleakest year in living memory, we resolve that our organisation will re-emerge from Covid, stronger, closer to our audiences, and, through our work, we will strive to address some of the most pressing issues that will help us rebuild and heal our society. Our research through the key points of 2020 has helped to inform the decisions we have made – ensuring the music fans and the concert goers are at the very heart of our thinking.

As we look ahead to 2021 – accepting the uncertainty we all may have to live with – the RPO identifies six key issues it will tackle head on and, in doing so, ensure that the Orchestra enriches lives.

Diversification: 2021 will be a year of uncertainty and rebuilding. Culture is the glue that holds society together, but it must remain flexible and agile, so it can respond positively to the inevitable changes in society resulting from the virus. With this in mind, the RPO will create a more blended model that balances live performance and digital work. In terms of programming, the RPO already leads the sector in terms of diversity – our music programming ranges from Mahler to Rod Stewart, from computer game music to film soundtracks. We believe this is the future for the orchestral genre, enabling orchestras to touch the broadest possible audience.

Community outreach: As the pandemic subsides, the arts have a key role in the wider UK cultural ecology. Our research demonstrates the appetite for orchestral music is strong beyond the capital, yet, across the UK, there are towns and cities whose concert halls and theatres have been closed for most of the year. The RPO will continue with its commitment to serving communities outside London, particularly considering the substantial challenges for local authorities.

Equality: Covid has taught us that we are all the same. Wealth, location, beliefs – none of these have given protection or advantage. We have all been exposed to the same deadly virus, and we have all had similar hopes and fears for much of 2020. The arts have always been a positive force for good in society and now is the time for music to unite people, to remind us of what we have in common and can share. For 2021, the RPO will actively encourage access to experience and participate in music. We are also working on a new inclusion and diversity action plan to bring meaningful long-term change to our organisation and our sector.

Education: Covid has hit school children hard; their education has been disrupted significantly. Despite years during which music has been marginalised in the national

curriculum, our research showed that children turned to music and started learning an instrument to help them during lockdown when schools were closed. In 2021, the RPO will be working in partnership with Music Education Hubs to re-enforce its cultural work for young people. It is time to stop talking about ‘core’ and ‘non-core’ subjects in the classroom and instead to invest in creative expression as a tangible life skill that adds value to our society and our economy.

Mental health: Our research has highlighted the positive role music plays to support mental health and wellbeing. For many people, the aftermath of the Covid era will leave a profound impact on mental health, as society and the economy slowly recover. We need to explore this further, and through our community and education programmes, we will partner with organisations to better understand how music can help people cope with and overcome mental health challenges. From our research during lockdown, it is abundantly clear that, to the consumer, there is a direct correlation between music and wellbeing. This is something we must build on.

Global ambassador: Covid was a global phenomenon, and the knowledge-sharing between the scientific community in finding a vaccine crossed international boundaries. Covid made the world smaller through a shared experience.

However, as we near the end of 2020, Brexit quietly approaches. There is a paradox here: whilst Brexit threatens the UK music community, our research reveals that 47% of people believed that music was one of the UK’s greatest exports to the world, and 41% felt UK music presented the best of Britain to the wider world. Whilst Brexit threatens to make Britain isolationist, we need culture to maintain relationships and to build friendships internationally.

Whatever Brexit brings, the RPO will be a cultural ambassador on the world stage. As one of the world’s most prolific touring orchestras and one of the UK’s most respected ensembles, the RPO unites people through the international language of music.

Today’s orchestras need to embrace the changing consumer world. Now is a time to look forward, to invest in the genre’s future, to build on successes, and to create the orchestra for the modern age. Digitisation is changing the way people communicate, buy, and share. Consumers rightly expect the brands they deal with to maintain the highest ethical standards and to be socially relevant. Also, at times of change – even uncertainty – the arts have a pivotal role in uniting people, enriching lives, and making society more inclusive.

We believe the Royal Philharmonic Orchestra is well placed to define the orchestra of tomorrow. The building blocks were in place before Covid struck, and the pandemic calls on culture to play an active role in rebuilding society. Our research in 2020 has informed our thinking, and we would like to thank the 8,000 households around the UK that gave up their time to advise us – giving us the opportunity to listen.

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P12: *RPO Trumpeter Mike Allen at the Beton Building, Wembley Park*
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P21: *Vasily Petrenko conducting the Royal Philharmonic Orchestra at the Royal Festival Hall, London*
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RPO Resound: Lullaby Project, performance
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RPO at Royal Albert Hall
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For more information contact:

Guy Bellamy / Jim Follett - elephant communications
Tel: 07766 775216 or 07908 551571
guy@elephantcommunications.co.uk
jim@elephantcommunications.co.uk

Royal Philharmonic Orchestra Limited
16 Clerkenwell Green
London EC1R 0QT
England, United Kingdom

Registered number: 763836
Registered Charity number: 244533

+44 (0)20 7608 8800

rpo.co.uk

Twitter @RPOonline
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