



Creating a More Inclusive Classical Music

A study of the English orchestral workforce
and the current routes to joining it

Workforce Survey

2021

By ICM Unlimited

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1 INTRODUCTION

Background

In summer 2019 Arts Council England appointed ICM Unlimited and DHA to undertake research looking at the diversity of the classical music workforce, with a particular focus on England. The aims of the research project include reviewing and developing the evidence base about current employment in the sector, routes into the sector and identifying if and where evidence exists of interventions that may be effective in enabling underrepresented groups progress through education and into employment. The research study has three elements: a literature review, a data audit and analysis of available data and a workforce survey. The first two elements provided useful reference and context for the focus of the survey, and also represent a mapping of possible areas of future exploration and data analysis.

This report focuses on the findings and analysis of the workforce survey. The survey was a 10 minute online survey of those who identified as working in the classical music sector. The survey was conducted between 11th February and 16th March 2020. In total, 967 people completed the survey, all aged 16 years and over. There are corresponding reports for the literature review and audit of existing data sources.

The literature review includes background on the increasing focus of diversity in the classical musical sector as well as where research on diversity in the classical music workforce has been taking place, who has been doing it, the types of diversity being explored and an examination of methodological considerations. It then goes on to investigate what the literature currently tells us including sections on representation of different groups; training and education; experiences and effects of diversity in the workforce; and finally, initiatives to diversify the workforce.

The data audit includes the mapping of available data sources. It focuses upon data relating to those who work and learn in England, reflecting the Arts Council's remit.

Across all three elements of the research, diversity should be taken to include age, gender, ethnicity, disability, and social grade status although it is appreciated that this does not reflect the full range of characteristics associated with the term.

Organising the findings

This report is organised into ten main sections, predominantly following the structure of the survey.

Following a survey methodology chapter, which outlines the approach undertaken to conducting the survey and other related considerations around the method, the demographic profile of those who responded to the survey is detailed, including an examination of the profile of respondents in light of the findings from the data audit. The subsequent section then explores the role of background, with a focus on where respondents grew up and their familial background. The fifth section examines respondent's current role in the music sector, including current work and career duration. The sixth section examines education and training, including different pathways into the

sector. The final sections of the report, cover respondents' perceptions of the classical music sector, as well as any barriers or challenges they may have disclosed.

This report aims to maintain an element of consistency for ease of reading. The beginning of the section includes a summary, followed by a more detailed examination of the data, including the overall picture and then the experiences of different sub-groups.

2 EXECUTIVE SUMMARY

This workforce survey presents the findings from an online survey conducted with 967 people who identified themselves as working in the classical music sector. The research was carried out between February and March 2020.

The survey sought to understand the diversity profile in the classical music sector and explore the experiences of respondents.

The survey was promoted across various social media and network channels by Arts Council England and membership bodies, organisations and individuals in the classical music sector. Thus, the survey results represent the profile of a self-selecting group.

There are specific groups of people that the survey over represents when comparing against data collected in the Data Audit including, younger females; Black and other ethnically diverse groups; those who identify as deaf, disabled or having a long-term health condition; and those who identify as LGBTQ+. This should be taken into consideration when reading the findings below.

Pathways into classical music

1. There is a **lack of diversity in the workforce in relation to upbringing**

The vast majority of survey respondents were in the higher social grades (ABC1) when they were growing up, and most have parents with higher education qualifications. Those in lower social grades and whose parents did not have higher educational qualifications were likely to be older, suggesting this may be a trend that will continue to grow.

The majority of respondents also have parents who had an interest in classical music when they were growing up. Just over seven in ten respondents said that their parents had an interest in classical music when they were growing up (72%), while just under three in ten said that their parents did not have such an interest (28%). This is a group of interest for further research: what is it that attracted them to the industry and what can be learnt from them to attract a more diverse population in the future?

There is evidence that upbringing also impacts **access to training and opportunities**. Results from the survey highlight that those with parents with higher education qualifications and with an interest in classical music were more likely to have benefitted from a wider range of training and development opportunities in classical music. Indeed this appears to be greater than the impact of place of birth or social grade.

Those with parents with higher education qualifications tended to have benefitted from a wider range of training and education opportunities. In fact, the only opportunity that respondents whose parents do not have higher education qualifications were more likely to have had than respondents whose parents did have such qualifications was **free music tuition at a state school** (53% vs. 36%).

The survey also shows that respondents in the higher social grades – ABC1 – were more likely than those in the C2DE grade when growing up to have undertaken **private music tuition** (76% vs. 56%) and **tuition through higher education** (81% vs. 72%). The only opportunity that C2DE respondents were more likely to have undertaken was **free music tuition at a state school** (56% vs. 39% of ABC1).

2. Access to opportunities have shifted over time

The survey finds a relationship between age and access to opportunities in music. ‘Older’ respondents (aged 50 or over) were more likely than ‘younger’ respondents (aged under 50) to have had **free music tuition** at a state school, with the opposite pattern being the case for paid-for music tuition at a state school. Similarly, ‘younger’ respondents were more likely than ‘older’ respondents to have undertaken **private tuition** as part of their training and education in music. Three-quarters of 16-34-year-olds (75%) and 35-49-year-olds (75%) said that they had had private tuition in one form or another, compared to just under two-thirds of those aged 50 or over (63%).

The current job landscape

The survey did not seek to ascertain whether respondents have had the job opportunities they wanted, rather to capture a sense of the current picture of the workforce.

3. Gender differences exist within the current workforce

There were clear differences between male and female respondents with regard to their role in the classical music sector. Men who responded to the survey were more likely than women to work with an **orchestra and/or other large instrumental music ensemble**, more likely **to play or perform with an instrument** as part of their current role, more likely **to hold senior administration positions** such as CEO and artistic director, and more likely to have been **involved in the sector for a longer period of time**.

4. Differences by ethnicity also exist within the current workforce

Black, Asian and other ethnically diverse respondents were more likely than white respondents to **work as a session musician** and **as a soloist and/or featured artist**. Nearly three in ten Black, Asian and other ethnically diverse respondents **work as a session musician** (27%), compared to fewer than two in ten white respondents (17%). Around a quarter of Black, Asian and other ethnically diverse respondents said that they **work as a soloist and/or featured artist** (24%), compared to 15 per cent of white respondents. Black, Asian and other ethnically diverse respondents were also twice as likely as white respondents to **work in or with a small ensemble band (in a non-classical genre of music)** (24% vs. 12%).

5. There is a relationship between parental upbringing and longevity in the sector

Those with parents interested in classical music were more likely than those whose parents had no such interest to have been involved in the classical music sector for longer. Over half of those with parents interested in classical music said that they have been involved in the classical music

sector for **over 15 years** (54%), compared to around four in ten of those whose parents were not interested in classical music when they were growing up (41%). This could suggest that there are limited signs that parental education is now less of a factor than it was historically.

Motivations for considering work

6. The working environment is especially important for LGBTQ+ respondents

Eight in ten LGBTQ+ respondents said that **liking the working environment** was one of the most important factors to them (80%), compared to fewer than seven in ten of those who identify as heterosexual (67%). A greater proportion of LGBTQ+ respondents than heterosexual respondents also said that one of the most important factors is that the **work is with other people I know and like** (54% vs. 46%) and, similarly, that the work is with other people who are like me (34% vs. 26%). Among LGBTQ+ respondents, there was also an increased emphasis on the importance of being able to travel safely and conveniently to the work, with over four in ten saying that this was one of the most important factors for them (43% vs. 35% for heterosexual respondents).

7. More needs to be done to make working environments feel open, safe spaces for disclosure

Around six in ten LGBTQ+ survey respondents said that they are open about their gender identity and/or sexual orientation with everyone (61%), while a further third said that they are open with some people (34%) at their organisation. Around one in twenty LGBTQ+ respondents said that they are open with no one (four per cent).

A majority of disabled respondents said that they are open with at least some people in their organisation about their disability, although **only around a third said that they were open with everyone**.

8. Prestige and networking is more of a concern for those in higher social grades and with parents interested in classical music

Four in ten of those in the social grades ABC1 said that **the work being prestigious** is one of the most important factors when considering work in the sector (41%), compared to three in ten of those in the social grades C2DE (29%). Moreover, over a third of those who were in the ABC1 social grades when they were growing up said that **the work benefitting their profile** is an important factor to them when considering work in the sector (35%), compared to around a quarter of those in the C2DE grade (26%).

Similarly, four in ten of those with parents who had an interest in classical music said that one of the most important factors to them when considering work in the sector is that **the work is prestigious** (41%), compared to around a third of those whose parents were not interested in classical music (34%).

Moreover, a greater proportion of those respondents with parents engaged in classical music than those whose parents were not engaged said that factors relating to their **previous experiences** and **the people they work with** are among the most important.

The barriers and challenges faced

9. Specific groups have experienced barriers that have restricted their opportunities

More survey respondents agreed than disagreed that they face or have faced barriers that restrict the opportunities available to them. It also finds that the most commonly mentioned barriers relate to **gender discrimination** and **financial constraints (e.g. low salaries / unpaid internships / cost of instruments)**.

Looking beyond the overall level, the proportion who felt that there are or have been barriers is higher among **female respondents, respondents aged under 50, LGBTQ+ respondents, disabled respondents, and, particularly, Black, Asian and other ethnically diverse respondents**. Indeed, half of LGBTQ+ (48%), disabled respondents (49%) and Black, Asian and other ethnically diverse respondents (55%) agreed that they face or have faced barriers restricting the opportunities available to them.

3 METHODOLOGY

The approach

ICM carried out a short (10 minute) online survey of those who identified as working in the classical music sector between 11th February and 16th March 2020. In total, 967 people completed the survey, all aged 16 years and over.

The survey adopted a ‘census’ sampling approach, inviting all who were eligible to participate. In addition to directly promoting the survey to National Portfolio Organisations, and through its website and social media channels, Arts Council England worked with membership bodies and other organisations and individuals in the classical music sector to promote the survey link, including the Association of British Orchestras (ABO), BBC Orchestras, Conservatoires UK and the Musicians Union. These four sector organisations, whose data forms a substantial element of the data audit report, were represented within a Steering Group which contributed to the design and oversight of this research: in the case of the ABO, its membership was represented – in addition to its Director – by the Chief Executives of three member organisations, Chineke!, the Paraorchestra, and the Bournemouth Symphony Orchestra. It should be noted that the particular advocacy of these three CEOs in encouraging their specific constituents to engage with the survey may have directly or indirectly impacted on the response rates of specific communities, including the potential that their populations are overrepresented within the survey results.

ICM scripted and hosted the survey, providing a generic survey link, enabling it to be used by numerous organisations to distribute the survey via their own channels.

Arts Council England supplied communication copy to these membership bodies to aid uptake, including key information to ensure participating bodies fully understood why the research was taking place and to whom it should be promoted (i.e. who was eligible to participate in the survey, why the research was important and why all possible respondents’ opinions matter) along with text that could be used to promote the survey directly to their members (including individual musicians and others working in the classical music sector). These communications were designed to provide both a short, clear explanation of why the survey was being conducted, its benefits, and a call to action to share the survey with other colleagues in the classical music sector to broaden the reach of the survey.

Predominantly, the survey was communicated via email and Twitter. In addition, Arts Council England also wrote a supporting blog post¹ (6th February 2020) outlining the research project and signposting readers towards participation in the survey.

A ‘census’ sampling approach

In any survey we want to most accurately represent the population that we are researching. However, this is dependent on already having a profile of the population we want to survey. For this research, an existing profile of the classical music sector population was not available, most

¹ <https://www.artscouncil.org.uk/blog/diversity-classical-music>

likely because it is a relatively niche and under-researched group, that has not previously been accurately profiled. In such cases, a 'census' style approach to the sampling is generally taken, aiming to collect information from everyone in the population. Thus, this workforce survey was open to anyone who identified as working in the classical music sector and distributed through as many channels as possible to reach as large a proportion of the active workforce as possible.

The sample population who chose to take part in the survey nonetheless needs consideration:

The sample does not include everyone who works in the classical music sector, and thus may not accurately represent the whole of the population. Whilst the survey was distributed and promoted with the intention of obtaining as great a reach as possible, it is not possible to reach the entirety of a population such as this. Furthermore, it has not been possible to concretely highlight where the sample is not representative as no verifiable pre-existing profile of the classical music sector population is available (though we aim to use our findings from the data audit to shed some light on this in section three). Therefore, some caution when reading this report is necessary: it has been made clear throughout that findings are based on those who took part in the survey rather than the classical music sector at large.

The survey results therefore represent the profile of a self-selecting group of those who work in the classical music sector; consequently, there will be an element of self-selection bias within the sample profile. The survey was promoted as being designed to enable understanding of sector inclusivity and diversity. Certain groups or individuals may have been consequently more or less likely to take part in the survey, and therefore certain groups or individuals may be over- or under-represented in the data.

The research, and survey link, may not have reached everyone who works in the classical music sector (i.e. performers, and those who support music making by musicians playing western classical orchestral instruments) as membership organisations' own membership lists and social media messaging were the predominant approaches used to reach and engage participants. No one organisation holds all the details of all those who worked in the classical music sector.

The use of an open survey link does raise potential for duplicate submissions (i.e. an individual completing the survey questionnaire more than once), though the likelihood of this is considered to be extremely low, given the nature of the participant group and the topic of the survey.

A note on the sample size

This survey reflects the views of 967 people and this should be taken into consideration when reviewing the survey findings. The accompanying Executive Summary though highlights how the key findings from the survey reflect the broader data and literature review findings.

Designing the questionnaire

When designing the questionnaire significant consideration was given to ensuring that it met the needs of the research, that the language used was clear and easy to understand, and that the tone reflected the content of the questionnaire. ICM worked closely with Arts Council England, as well as stakeholders from across the classical music sector included in the DiCM Steering Group who reviewed draft and final versions of the survey questionnaire.

Where possible, ICM used tried and tested question wording that had been used in previous surveys; a majority of the demographic questions were aligned to Arts Council England survey guidance².

A note on timings

Fieldwork for the workforce survey took place between mid-February and mid-March 2020. This coincided with the commencement of the Covid-19 pandemic: in February the first transmission of Covid-19 was confirmed in the UK and on 16th March (the last day of fieldwork) Boris Johnson gave his first daily press briefing on Covid-19 and urged those who could to begin working from home.

However, within the period of fieldwork, the impact of Covid-19 was not yet fully known, and most were carrying on their daily lives as usual. Consequently, we believe there was little impact of the Covid-19 pandemic on the uptake of the survey or the attitudes and perceptions expressed.

Understanding the data

As a pre-existing profile of the overall population of the classical music sector³ workforce (especially in its broad definition as applicable within this work) is not available, the data has not been weighted. A consequence of not interviewing the entire population means that the results are subject to sampling tolerances, and not all observable differences are statistically significant. Any differences discussed during the report are statistically significant at a 95% confidence level, unless specified.

Where less than 50 people have responded to a question in the survey, the data should be interpreted as being indicative only and not representative of the wider population.

All data presented in this report is as percentages, unless otherwise specified.

During our analysis of sub-groups we refer to the following groups of individuals:

- **Those with a disability:** respondents who stated that they are D/deaf, disabled and/or have a long-term health condition
- **Those who identify as LGBTQ+:** respondents who identify as lesbian, gay, bisexual, trans or queer
- **British, Asian and other ethnically diverse respondents:** those who are of mixed or multiple ethnicities; Asian; Black, African, Caribbean or Black British; or those who identified as an 'other ethnic group'
- **Those in ABC1 when they were 14 years old:** this is a classification for social and economic grouping of people from upper, middle, or lower middle class
- **Those in C2DE when they were 14 years old:** this is a classification for social and economic grouping of people who are skilled working class, working class or non working

² <https://www.artscouncil.org.uk/advice-guidance/annual-survey-guidance>

³ Classical music sector in this instance refers to symphony orchestras, chamber orchestras and ensembles, the orchestras of the opera (and ballet) companies as well as those who work in the music industry either on instruments commonly associated with western classical orchestral music and/or in the jobs/roles which support the platforming of such music.

- **The North:** respondents who selected North East, North West or Yorkshire and the Humber
- **The South:** respondents who selected South East or South West
- **The Midlands:** respondents who selected East Midlands or West Midlands
- **Players:** respondents whose current role involves playing an instrument.

GDPR and data protection

ICM Unlimited, as part of Walnut Unlimited, abides by the MRS Code of Conduct, and is fully GDPR compliant. This means that respondents were given clear information about the research and its purpose, and that data was collected with their informed consent. Please see the Appendix for the full text presented to respondents at the beginning of the survey.

4 WHO PARTICIPATED IN THE SURVEY?

Who could participate in the research?

Clear guidance was provided at the beginning of the survey, and in related communication materials, about who the survey was for, with a view to reaching a broad range of those associated with classical music, including performing musicians, teachers and administrative and other support staff including learning and participation professionals. Those who work on a freelance basis were included in addition to those on permanent contracts, reflecting the working practices of the sector. Those whose instrumental background is in classical music but whose current work within the music sector takes place in other musical genres were also included, consequently alongside those who work in or with chamber groups and formal orchestral settings, instrumental musicians working in pit bands and a broad range of popular music ensembles and contexts, were also invited to participate. Those who participated could also be at the beginning of their career or have been involved in the sector for many decades.

Composers, singers and pianists were asked not to participate in the survey, as were instrumentalists focused on specific genres other than classical music, e.g. saxophonists. Whilst it is recognised that these musicians may make a substantial impact on the overall diversity of classical music in its broadest context, the survey methodology chose to focus on developing a true picture of diversity within a more narrowly defined segment of the sector in order to identify the points where its diversity becomes diminished. The complexity of, and differences in, training trajectories and career patterns between these musicians and those who work in, in particular, orchestral contexts, was an important consideration in doing so.

The survey was only available to those aged 16 years and over currently working in the sector, in line with the Market Research Society Code of Conduct. Classical Music students (i.e. those not currently undertaking paid employment of any kind within the classical music sector) were also asked not to complete the survey. This information is captured through the data audit.

The demographic profile

At the beginning of the survey, a set of demographic questions were asked to enable understanding of the profile of survey participants.

As a brief summary of the profile of those who took part in the survey: women make up a slightly greater proportion of the sample than men (54% vs. 44%), with more younger than older people taking part (43% were aged 20 to 34 years old, 29% were aged 35 to 49 years old and 27% were aged fifty years and over). Most (94%) currently live in England, with a half of these residing in London. The sample is predominantly white (89%), with one in ten respondents identifying as Black, Asian or from another diverse ethnic background; and the majority are heterosexual (77%) with 19% identifying as LGBTQ+. One in ten identified as being D/deaf, disabled or with a long term health condition.

When reading this report, the profile of each audience should be taken into consideration. Notably:

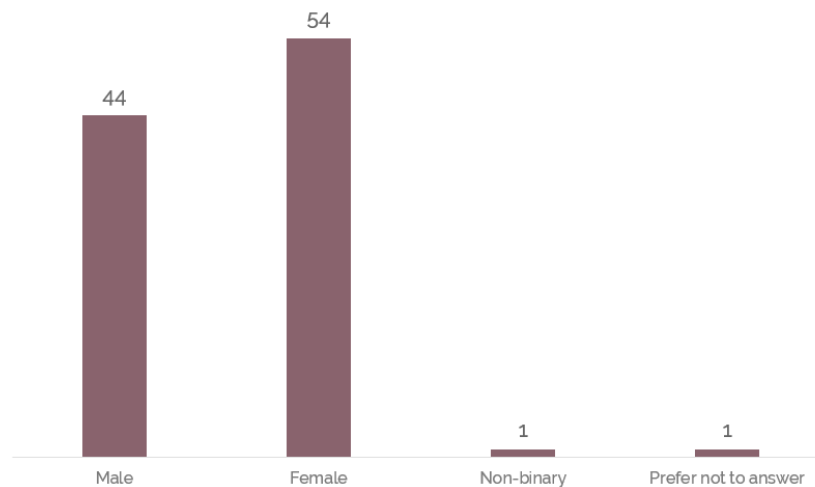
- **Women** were more likely to be younger, to live in the South of England and to have had a parent with a higher education qualification. They were also more likely to identify as heterosexual.
- **Younger people** were more likely to live in the South of England, and to identify as LGBTQ+. They were also more likely to have parents from socio-economic background ABC1 and to have parents with a higher education qualification.
- Respondents in the South of England are more likely to be female, younger and be **Black, Asian or from another ethnically diverse background**.
- **White respondents** were more likely to be older, heterosexual and live in the North of England.
- **Heterosexual respondents** were more likely to be female, older and to have had a parent with a higher education qualification.

In the sections below, the demographic profile of survey respondents is explored in more detail.

Gender identity

Over half of those who responded to the survey identified as female (54%) and under half identified as male (44%). Ten people identified as non-binary (one per cent).

Figure 3.1: Gender identity of respondents (%)

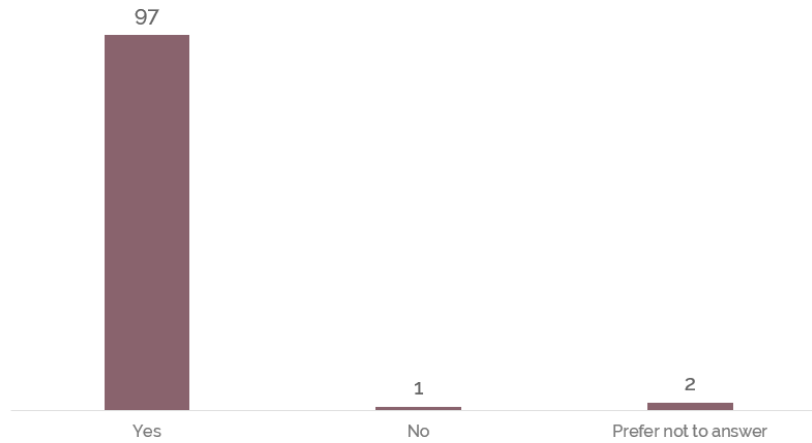


D1. Which of the following describes how you think of your gender identity? Base: All respondents (967)

Gender identity as assigned at birth

Nearly all who responded to the question on gender said that their current gender identity was the same as the one they were assigned at birth (97%). One per cent said their gender identity was not the same as they were given at birth, and two per cent did not give an answer.

Figure 3.2: Gender identity is the same as assigned at birth (%)



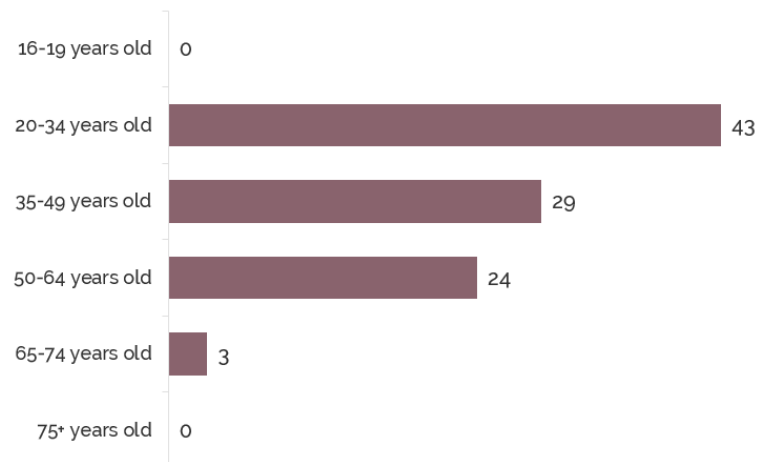
D2. Is your gender identity the same as the sex you were assigned at birth? Base: All respondents (967)



Age

Just over four in ten respondents were aged between 20 and 34 years old (43%), three in ten were aged 35 to 49 years old (29%), and just over a quarter were aged fifty years and over (27%).

Figure 3.3: Age of respondents (%)



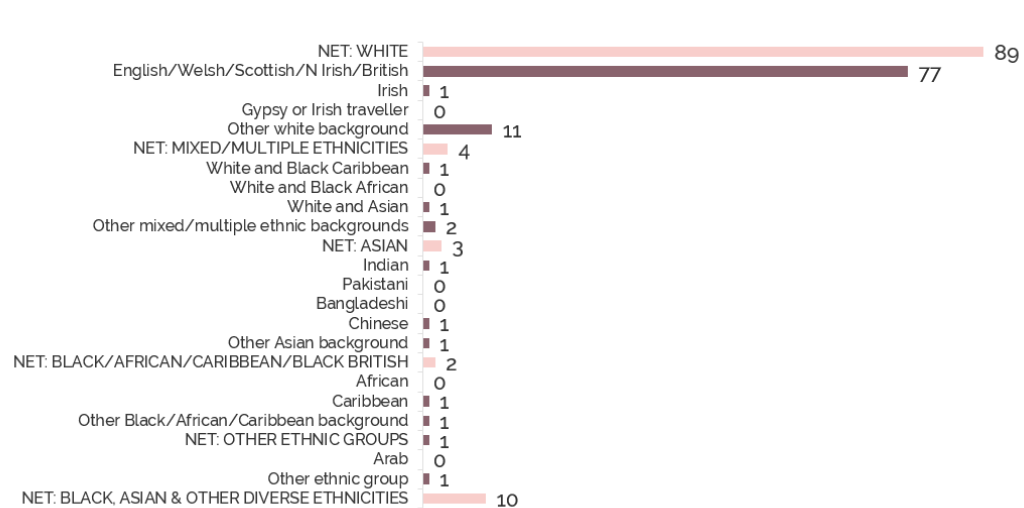
D3. Please could you tell us your age. Base: All respondents (967)



Ethnicity

Around nine in ten people who responded to the survey were of white ethnicity (89%), with the majority of those (77%) stating they were English, Welsh, Scottish, Northern Irish or British. One in ten of the sample stated that they were Black, Asian or from another ethnically diverse group: of these, four per cent were from mixed or multiple ethnic groups, three per cent were Asian, two per cent were Black/African/Caribbean or Black British and one per cent identified as an ‘other ethnic group’.

Figure 3.4: Ethnicity of respondents (%)



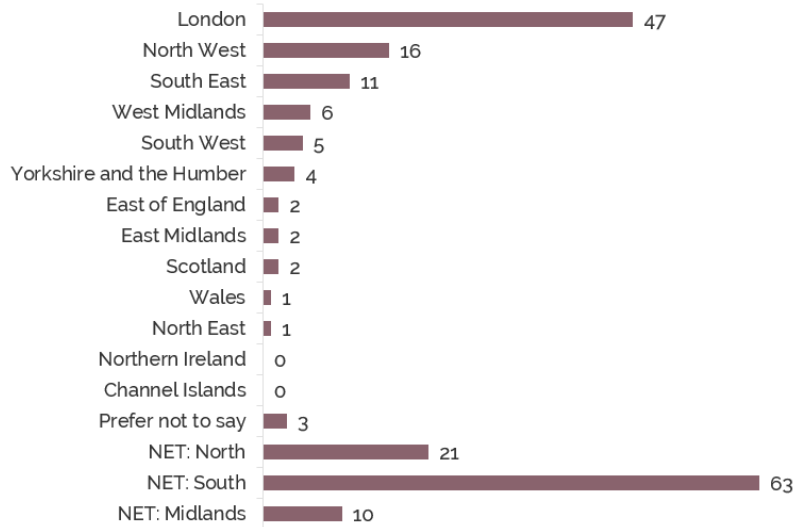
D4. Which of these best describes your ethnic group? Base: All respondents (967)

Please note the relatively low base size of those who identify as Black, Asian or ethnically diverse and take this into consideration when reading the rest of the report.

Where they live

Nearly half of all respondents to the survey stated that they currently live in London (47%). Around one in twenty lived in the North West (16%) and one in ten (11%) the South East. When the results are netted together, nearly all lived in England (94%), and three per cent of the sample currently live in Scotland, Wales, Northern Ireland or the Channel Islands.

Figure 3.5: Region respondents live in (%)



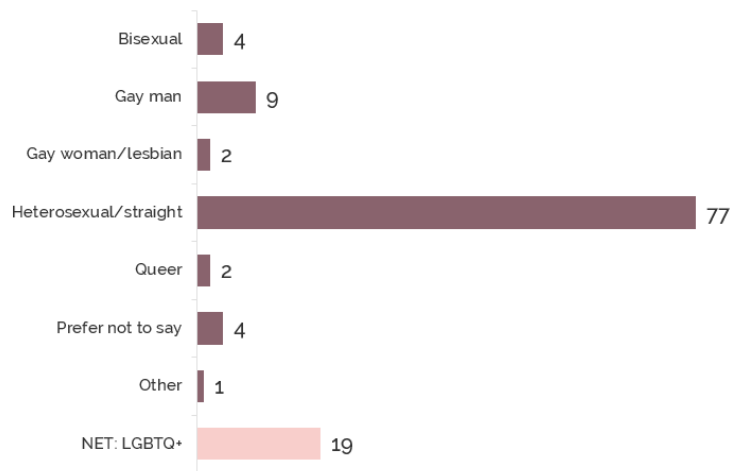
D7. Where do you live? Base: All respondents (967)

Sexual orientation

The majority of the sample (77%) stated that they were straight or heterosexual, with nearly two in ten (19%) identifying as LGBTQ+: nine percent said they were a gay man, four percent that they were bisexual, and two per cent said they were a gay woman or lesbian and an equal proportion that they were queer (two per cent).

Please note the relatively low base size of those who identify as LGBTQ+ and take this into consideration when reading the rest of the report.

Figure 3.6: Sexual orientation of respondents (%)



D5. Which of the following options best describes how you think of yourself? Base: All respondents (967)

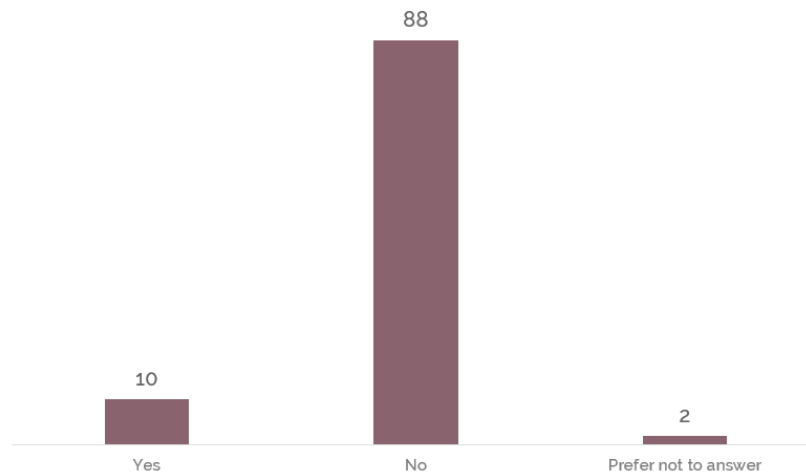
Disability

One in ten of those who participated in the survey said they were D/deaf, disabled or had a long term health condition (10%), with around nine in ten (88%) saying they do not identify as D/deaf, disabled or having a long-term health condition.

Around one in twenty of the LGBTQ+ respondents said they had a disability (16%) significantly more than straight or heterosexual respondents (eight per cent).

Please note the relatively low base size of those who identify as having a disability and take this into consideration when reading the rest of the report.

Figure 3.7: Whether respondents are D/deaf, disabled or have a long-term health condition (%)

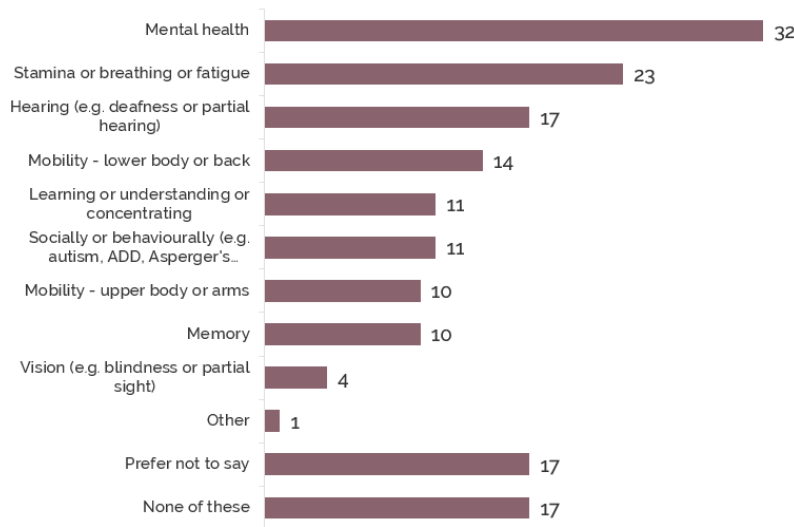


D6. Do you identify as a deaf or disabled person or have a long-term health condition? Base: All respondents (967)

Of those who had a disability, including D/deafness, disability or a long-term health condition, the most likely impact this had on them was on their mental health (32%). This was followed by issues with stamina, breathing or fatigue (23%), hearing, for example deafness or partial hearing (17%), and mobility of their lower body or back (for example walking short distances or climbing stairs) (14%). All other issues impacted around one in ten (see chart below for data), apart from issues with vision which impacted four per cent of respondents with a disability. Around half (49%) only answered one option on the list provided in the survey, however around a third (32%) said they had experienced one or more of these challenges.

As this is based on a relatively low based size (n=92) no further sub-group analysis has been conducted on the data as the base sizes are too low.

Figure 3.8: Impacts of D/deafness, disability or long-term health condition (%)



D6b. You said you identify as deaf, disabled or as having a long-term health condition. Does this affect you in any of the following areas? Base: All who identify as deaf, disabled or having a long-term health condition (92)

Below is a more detailed breakdown of each of the profiles of those who took part in the survey:

- **Women make up a slightly greater proportion of the sample than men (54% vs. 44%)**
 - The female profile is younger than the male profile (50% of women are aged 16 to 34 years old compared to 35% of men).
 - A quarter of male respondents (25%) live in the North of England (consisting of North West, North East and Yorks and the Humber) significantly higher than the proportion of females (18%). Females on the other hand are more likely to live in the South. Two thirds of female respondents (66%) live in the South (consisting of London, South East and South West) compared with six in ten males (59%).
 - Seven in ten women (71%) said that their parents had a higher education qualification significantly higher than the proportion of men that said the same (60% of men said their parents had a higher education qualification).
 - More men were likely to identify as LGBTQ+ compared with women. 24% of males identified as LGBTQ+ (24%) compared with females (14%). This was largely driven by those saying they were a gay man (21%).

- **More young people took part in the survey (43% of respondents were aged 20 to 34 years old, 29% were aged 35 to 49 years old and 27% were aged fifty years and over)**
 - The younger age group of respondents (16 to 34 year olds) are more likely to live in the South of England (71%) compared with older age groups (59% of 35 to 49 year olds and 56% aged 50 years and over).
 - 16 to 34 year olds were more likely to be Black, Asian or from another diverse ethnicity. 12% of 16 to 34 year olds were Black, Asian or another diverse ethnic background compared with six per cent of those aged 50 years old and over.

- The younger age group (16-34 year olds) were more likely to identify as LGBTQ+ (25%) compared with older age groups (18% of 35-49 year olds and 12% of 50 year olds and over). People aged 16 to 24 in the UK are more likely to identify as lesbian, gay or bisexual than any other age group, in line with the pattern of survey respondents, however at much lower instances. In 2016 in the UK, 4.1% of the population aged 16 to 25 identified as lesbian, gay or bisexual⁴.
- The younger group of respondents (aged 16-34) were more likely to be from socio-economic background ABC1 than a C2DE background. 82% of 16 to 34 years olds have parents who were in socio economic group ABC1 when they were 14 years old compared with 79% of 35 to 49 year olds and 69% of those aged 50 years old and over.
- Similarly, three quarters of 16 to 34 year olds have parents with a higher education qualification compared with 67% of 35 to 49 year olds, and 49% of those aged 50 years and over.
- **Most currently live in England (94%),** with a half of these residing in London.
 - Those whose parents were in social grade ABC1 when they were fourteen years old were more likely to state they currently live in the South of England (64%) compared with those who came from a C2DE background (54%).
 - Those whose parents had an HE qualification were also likely to live in the South (66%) compared with those whose parents did not (57%).
- **Respondents were predominantly white (89%),** with one in ten respondents identifying as Black, Asian or another diverse ethnic background
 - White respondents were more likely to be older than Black, Asian and other ethnically diverse respondents. 28% of white respondents were aged 50 years and over compared with 15% of Black, Asian and other ethnically diverse respondents.
 - White respondents were more likely to be heterosexual (79%) compared with Black, Asian and other ethnically diverse respondents (67%), and concomitantly three in ten Black, Asian and other ethnically diverse respondents (29%) identified as LGBTQ+ compared with just under two in ten (18%) of white respondents.
 - White respondents were more likely to live in the North of England. Two in ten white respondents (23%) said they live in the North of England compared with five per cent of Black, Asian and other ethnically diverse respondents (5%).
 - Four per cent of Black, Asian and ethnically diverse respondents stated that their gender identity was not the same as the one assigned at birth, significantly higher than white respondents (one per cent).
- **The majority are heterosexual (77%)** with 19% identifying as LGBTQ+.
 - Heterosexual respondents were more likely to be female (58%) compared with 40% of LGBTQ+ respondents who said they were female.

4

[https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2016#:~:text=7..gay%20or%20bisexual%20\(LGB\).](https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2016#:~:text=7..gay%20or%20bisexual%20(LGB).)

- Those who identify as LGBTQ+ are likely to be younger than the heterosexual profile (56% of LGBTQ+ respondents are aged 16 to 34 years old compared with 41% of heterosexual respondents)
- Those who identify as heterosexual are more likely to state that their parents have a higher education qualification. 68% of heterosexual respondents said their parents had a higher education qualification compared with 60% of LGBTQ+ respondents.
- One in ten **identified as being D/deaf, disabled or with a long term health condition.**
 - Those who identified as D/deaf, disabled or with a long term health condition were more likely to identify as LGBTQ+. 32% of those with a disability said they were LGBTQ+ compared with 18% who do not have a disability.
 - Those who identified as D/deaf, disabled or with a long term health condition were more likely to state that their gender identity was not the same as the one given at birth (three per cent) compared with those who had no health condition or disability (one per cent).

Understanding the profile of survey respondents in light of the data audit

One of the three elements of this research study was a data audit and analysis of available data. Findings from the data audit and analysis⁵ can be used to provide guidance on whether the profile of survey respondents, presented in this report, is similar to those from available datasets. Conducting this comparison will give a sense of credibility or caution to the survey results: either that the profile of those who responded to the survey is broadly in line with wider datasets or there are certain groups of respondents that are over- or under-represented in the survey dataset, and thus, this data should be treated with a sense of caution as it may not represent the actual population.

A number of the datasets presented in the data audit are of a younger population than those in the survey or of a specific population within the classical music sector. For instance, the National Youth Orchestra of Great Britain data is of those in the orchestra aged 13-19-years-old; the In Harmony Project dataset is of children and young people from early years settings, primary and secondary ages. It is not appropriate to compare the survey respondent dataset with these other datasets as it is not comparing like-for-like. Therefore, to understand the profile of survey respondents, a comparison has been made with the two most appropriate datasets: Arts Council England NPO data and Musicians' Union membership data.

Gender profile

Within this workforce survey, 54% of respondents were female and 44% of respondents were male. When comparing against data from Arts Council England National Portfolio Monitoring Returns and Musicians' Union membership, more females responded to the survey than the natural population. Thus, **this survey slightly overrepresents the views and experiences of women and underrepresents those of men.**

⁵ Diversity in Classical Music: Data Audit and Analysis, DHA (2021)

Figure 3.9: Comparison of gender across datasets (%)⁶

	Profile of survey respondents	Arts Council NPO	Musicians' Union membership
Female	54%	44%	46%
Male	44%	48%	54%
Non-binary	1%	-	-
Prefer not to answer	1%	-	-

Gender and age profile

Figure 3.10: Comparison of gender by age across datasets (%)⁷

When examining the profile of gender by age, Musician's Union data is the only dataset available. This comparison shows that **more younger females participated in the survey**, and slightly fewer males aged 35 years and older took part than could be expected.



Gender and instrument profile

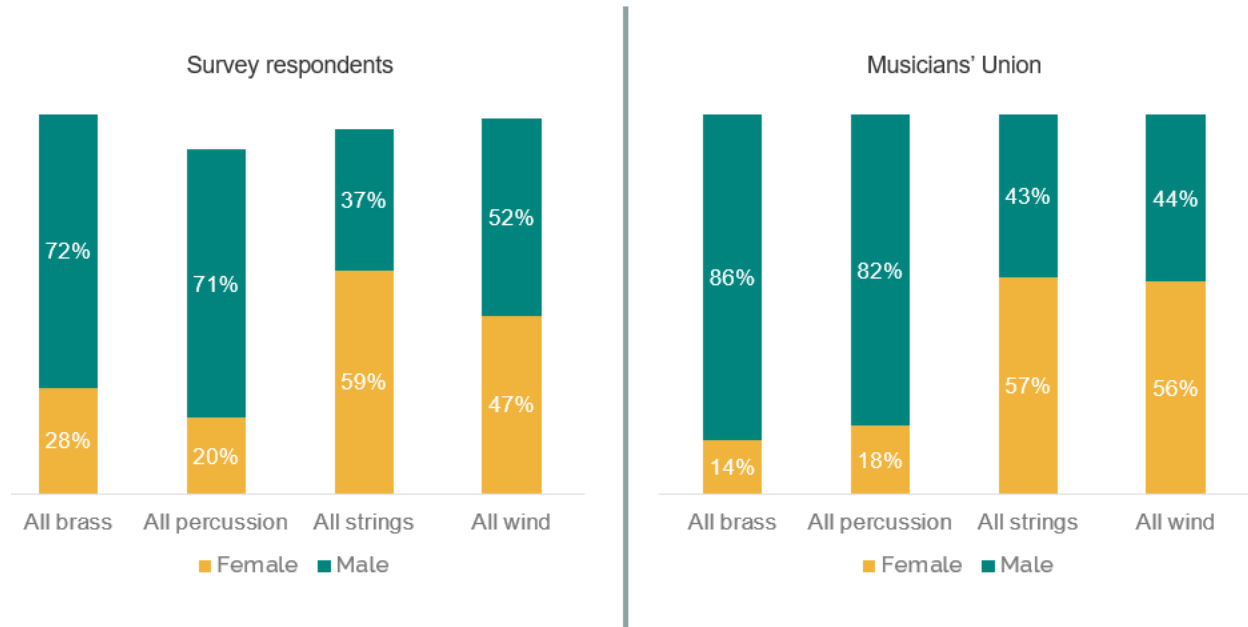
When examining the profile of gender by instrument, Musician's Union data is the most relevant dataset to use. This comparison shows that the relative proportions of male and female **players across all four instrument groups** who took part in the survey is in line with Musician's Union

⁶ Taken from Figure 1: Gender or sex of musicians by data source/grouping, Diversity in Classical Music: Data Audit and Analysis. Arts Council England National Portfolio Organisation (ACE NPO) Monitoring Returns 2015/2016, 2016/2017 and 2017/2018, base 10,349. Musicians' Union (MU) membership (see section 2 for detailed specification), base 5,520.

⁷ Taken from Figure 2: Musicians' Union membership by gender and age, Diversity in Classical Music: Data Audit and Analysis. Musicians' Union (MU) membership, base 5,469.

data. However, for brass, percussion and string groups, **men are under-represented** in the survey workforce. The survey **over-represents the views of female wind players**.

Figure 3.11: Comparison of gender and instrument across datasets (%)⁸



Ethnicity profile

In the survey, 10% of respondents identified as Black, Asian or from another diverse ethnic background and 89% as white. When comparing this against Arts Council England data, it shows that it is likely that the **number of respondents who are Black, Asian or from another diverse ethnic background are over-represented**, mostly likely thanks to the proactive contribution of Chineke! and other individual Black, Asian and other ethnically diverse musicians in encouraging participation.

Figure 3.12: Comparison of ethnicity across datasets (%)⁹

	Profile of survey respondents	Arts Council NPO
Black, Asian or another diverse ethnic background	10%	3%
White	89%	81%
Other White background		12%
Prefer not to say	1%	4%

⁸ Taken from Figure 6: Instrument by gender, Musicians' Union membership, Diversity in Classical Music: Data Audit and Analysis. Musicians' Union (MU) membership, base 5,520.

⁹ Taken from Figure 9: Ethnicity of musicians/artistic staff by data source/grouping, Diversity in Classical Music: Data Audit and Analysis. Arts Council England National Portfolio Organisation Monitoring Returns 2015/2016, 2016/2017 and 2017/2018, base 2,538. 'Not knowns' removed.

Disability profile

In the survey, 10% of respondents identified as D/deaf, disabled or having a long-term health condition, and 88% did not identify as this. When comparing against data from Arts Council England data, it appears that **the survey over-represents the views of those with a disability**, likely thanks to the proactive contribution of the Paraorchestra and other individual disabled musicians in encouraging participation.

Figure 3.13: Comparison of disability across datasets (%)¹⁰

	Profile of survey respondents	Arts Council NPO
Disabled	10%	2%
Non-disabled	88%	90%
Prefer not to say	2%	7%

Sexual orientation profile

In the survey, 19% of respondents identified as LGBTQ+ and 77% as heterosexual. The proportion of those identifying as LGBTQ+ in the survey is much higher than data from the Arts Council, however there are a large proportion of prefer not to say responses in this dataset so it may not accurately reflect the actual population. This reflects the issue with the general culture of non-disclosure which both the accompanying literature review and data audit explore in more detail¹¹.

Figure 3.14: Comparison of sexual orientation across datasets (%)¹²

	Profile of survey respondents	Arts Council NPO
LGBTQ+	19%	5%
Heterosexual	77%	55%
Prefer not to say	2%	40%

Conclusion

Comparing the profile of survey respondents with other available data sources highlights that this survey is not wholly representative of the sector. However, the findings discussed in following sections suggest themes and conclusions that appear significant enough to warrant comment and further investigation.

¹⁰ Taken from Figure 15: Disability amongst musicians by data source/grouping, Diversity in Classical Music: Data Audit and Analysis. Arts Council England National Portfolio Organisation Monitoring Returns 2015/2016, 2016/2017 and 2017/2018, base 10,349. Not knowns removed.

¹¹ Diversity in Classical Music: Data Audit and Analysis, DHA (2021) and Diversity in Classical Music: Literature Review, DHA (2021)

¹² Taken from Figure 23: Sexual orientation of musicians, Diversity in Classical Music: Data Audit and Analysis. Arts Council England National Portfolio Organisation Monitoring Returns 2015/2016, 2016/2017 and 2017/2018, base 7,506. Not knowns removed.

4 THE IMPACT OF UPBRINGING

This section looks at various factors related to the upbringing of survey respondents. It looks at where respondents were born, what their social grade was when they were children, and whether their parents have/had higher education qualifications and an interest in classical music. The chapter then goes on to explore the impact of these “upbringing” factors in relation to the current role of the respondents, the opportunities the respondents undertook as part of their training and education, and the perception of barriers restricting opportunities.

The section finds that – at least in relation to survey respondents – London is a magnet for people looking for work in the classical music sector, with many people moving away from their place of birth to live in the UK capital. It also finds that the vast majority of survey respondents were in the higher social grades when they were growing up, and that most have parents who have higher education qualifications. Those in lower social grades and whose parents did not have higher educational qualifications were likely to be older. Similarly, the majority of respondents have parents who had an interest in classical music when they were growing up.

In terms of the impact of these upbringing factors, the section goes on to find that those born in London were more likely than those born elsewhere to have had music tuition at a private school and tuition at a junior conservatoire. Those respondents in the higher social grades when growing up were also more likely than those in the lower social grades to have private music tuition.

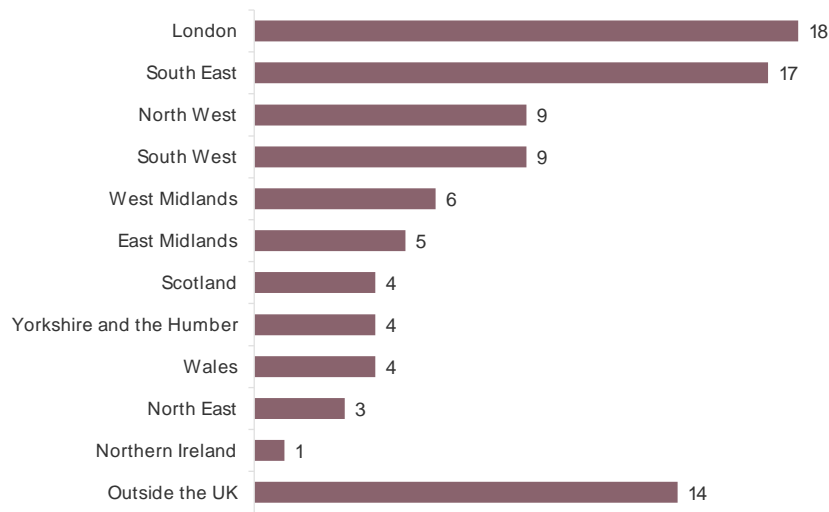
The section explores the impact of whether or not the parents of respondents have higher education qualifications and whether or not their parents had an interest in classical music. It finds that the impact of these two factors seems to be greater than place of birth or social grade. Indeed, those with parents with higher education qualifications and with an interest in classical music were more likely to have benefitted from a wider range of training and development opportunities in music.

Upbringing and differences across groups

With regard to place of birth, over four in ten survey respondents were born in the **South of England – comprising London, the South East, and the South West (44%)**, making it the most common region in which respondents were born. Just under one in five respondents were born in London (18%), while a similar proportion were born in the South East (17%). Around one in ten were born in the South West (9%). Beyond the South of England, just under one in six respondents were born in the **North of England** – the North East, North West, or Yorkshire and the Humber (16%), while one in seven were born in the **Midlands**, comprising the West Midlands, East Midlands, and the East of England (14%).

A quarter of survey respondents were born outside of England (25%); around one in twenty were born in Scotland (4%) and Wales (also 4%), and one per cent were born in Northern Ireland. Around one in seven were born outside of the UK (14%).

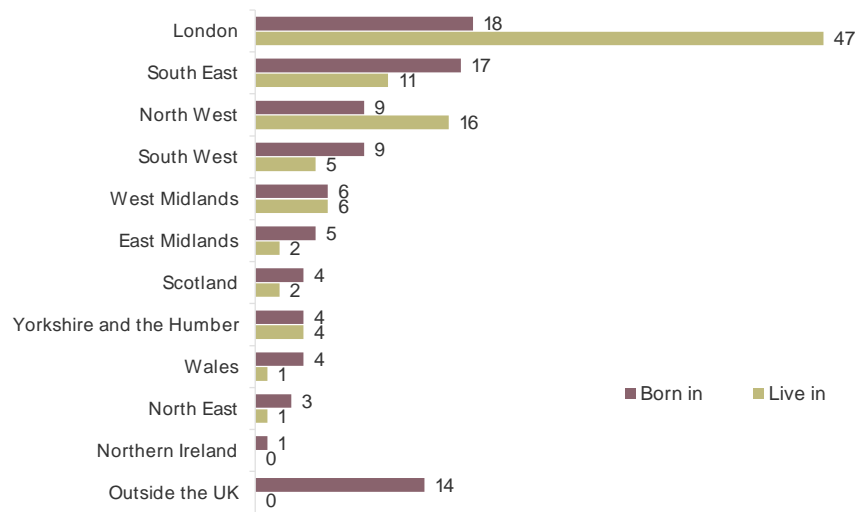
Figure 4.1: Place of birth (%)



D7a. Where were you born? Base: All respondents (967)

Despite London being the single most common individual region in which survey respondents were born (18%), it is even more predominant when it comes to where respondents currently live. Indeed, just under half of survey respondents currently live in London (47%), far more than live in any other individual region. This suggests that London is a magnet for people looking to work in the classical music sector, with people moving away from their place of birth to the UK capital. This is also true of respondents born outside of the UK, with such people being more likely to live in London than anywhere else. Of the people born outside the UK, nearly six in ten now live in London (56%). The only other region in which a greater proportion currently live than were born in is the North West, with just under one in six respondents living in this region (16%) compared to just under one in ten being born there (9%).

Figure 4.2: Where respondents were born versus where they live now (%)



D7. Where do you live? Base: All respondents (967)
 D7a. Where were you born? Base: All respondents (967)

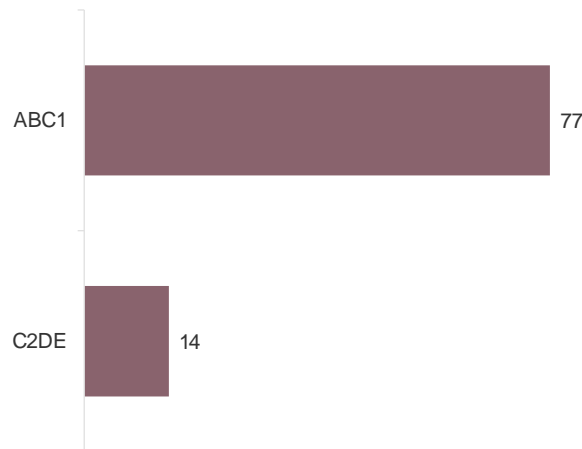
This pattern is especially pronounced among 16-34-year-olds. Just under two in ten of those aged 16-34 were born in London (18%), yet just over six in ten currently live there (62%).

Looking at which groups were more likely to be born in which places, with regard to gender, **male respondents were slightly more likely than female respondents to have been born in London**. Around one in five male respondents were born in London (21%), compared to around one in six female respondents (16%). Female respondents were slightly more likely than male respondents to have been born in the North (18% vs. 14%).

As for ethnicity, **Black, Asian and other ethnically diverse respondents to the survey were much more likely than white respondents to have been born in London**, with four in ten being born in London (41%), compared to only 15 per cent of white respondents. Black, Asian and other ethnically diverse respondents were over twice as likely as white respondents to have been born outside the UK (28% vs. 13%), while white respondents were much more likely than Black, Asian and other ethnically diverse respondents to have been born in the North of England (21% vs. 4%). Please note the relatively low base size of those who identify as Black, Asian and other ethnically diverse groups and take this into consideration when interpreting this analysis.

The vast majority of respondents to the survey were in the higher social grades when growing up. Just under eight in ten respondents were in the **ABC1 social grades when growing up (77%)**, compared to only around one in seven who were in the C2DE social grades (14%). This is a group driven by the higher social grade group, with 67% falling into AB.

Figure 4.3: Social grade of respondents when growing up (%)



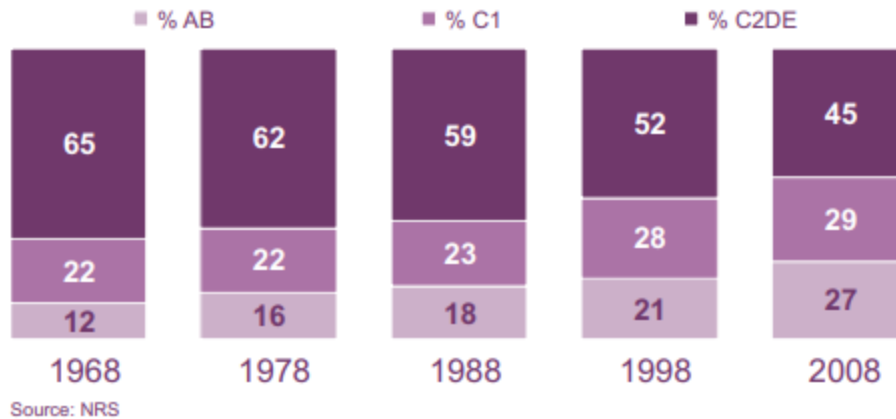
DSEG. Finally, we would like to understand a little bit more about your background. Please select the occupation of the main/ highest income earner in your household when you were 14 years old. Base: All respondents (967)

Respondents aged under 50 were more likely to be in the ABC1 social grades when growing up, with around eight in ten 16-34-year-olds (82%) and 35-49-year-olds (79%) in social grade ABC1 when growing up, compared to seven in ten of those aged 50 or over (69%). Over the last 50 years, the proportion of the UK population in the ABC1 social grades has steadily grown, while the proportion in the C2DE social grades has fallen¹³. This likely explains, at least in part, the pattern of a greater proportion of younger respondents than older respondents falling in the higher social grades when they were growing up.

As the chart below shows, 65% of those in the UK in 1968 were in social grades C2DE, and this has steadily declined over the years to 45% in 2008, whereas those in social grades ABC1 have increased (33% in 1968 vs. 56% in 2008).

¹³ *Social grade – Bite Sized Thought Piece*, Ipsos Mori, 2009 (https://www.ipsos.com/sites/default/files/publication/6800-03/MediaCT_thoughtpiece_Social_Grade_July09_V3_WEB.pdf)

Social Grade of CIE, 1968-2008



Across the other demographic sub-groups there were no other significant differences in terms of social grade profile. For instance, Black, Asian and other ethnically diverse respondents were just as likely as white respondents to fall in the ABC1 category (75% vs. 78%), and LGBTQ+ respondents were just as likely as heterosexual respondents to fall into the ABC1 social grades (74% vs. 78%).

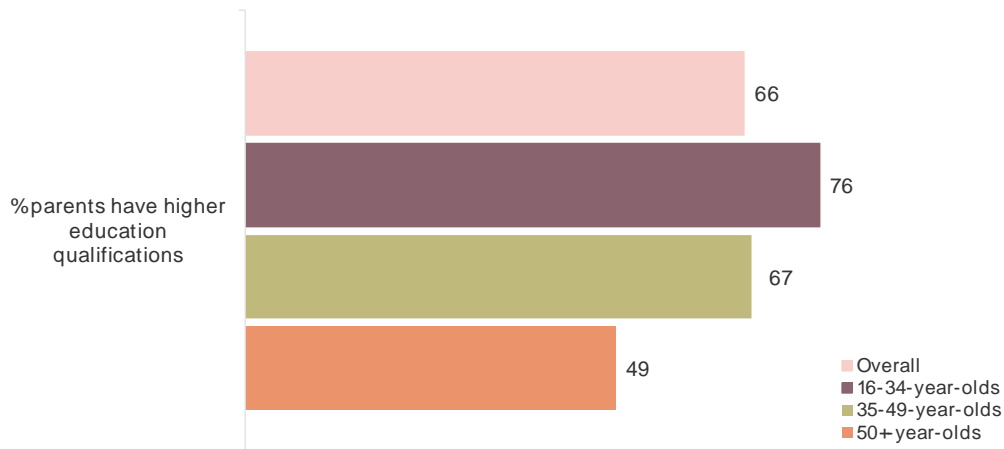
Performers are significantly more likely to have a parent with a higher education qualification. Seven in ten players (69%) said they have a parent with a higher education qualification compared with around a third of non-players (36%).

Looking in more detail at the profile of the parents of respondents – including natural parents, adoptive parents, step-parents or guardians, two-thirds of respondents **have/had parents who have higher education qualifications such as a degree, diploma or certificate of higher education** (66%). A third of survey respondents have/had parents with no higher education qualifications (33%).

Younger respondents were more likely than older respondents to have parents with higher education qualifications. Around three-quarters of respondents aged 16-34 (76%) have/had parents with higher education qualifications, compared to two-thirds of those aged 35-49 (67%) and around half of those aged 50 or over (49%). This is in line with the general trend seen across the UK, and globally, that there has been an increase in educational attainment over the past 30 years¹⁴.

¹⁴ https://read.oecd-ilibrary.org/education/education-at-a-glance-2015_eag-2015-en#page80

Figure 4.4: Proportion of respondents whose parents have higher education qualifications by age (%)



DPAR. Do/ did your parents (including natural parents, adoptive parents, step-parents or guardians) have any higher education qualifications such as a degree, diploma or certificate of higher education? Base: 16-34-year-olds (416); 35-49-year-olds (279); 50+ year-olds (263)

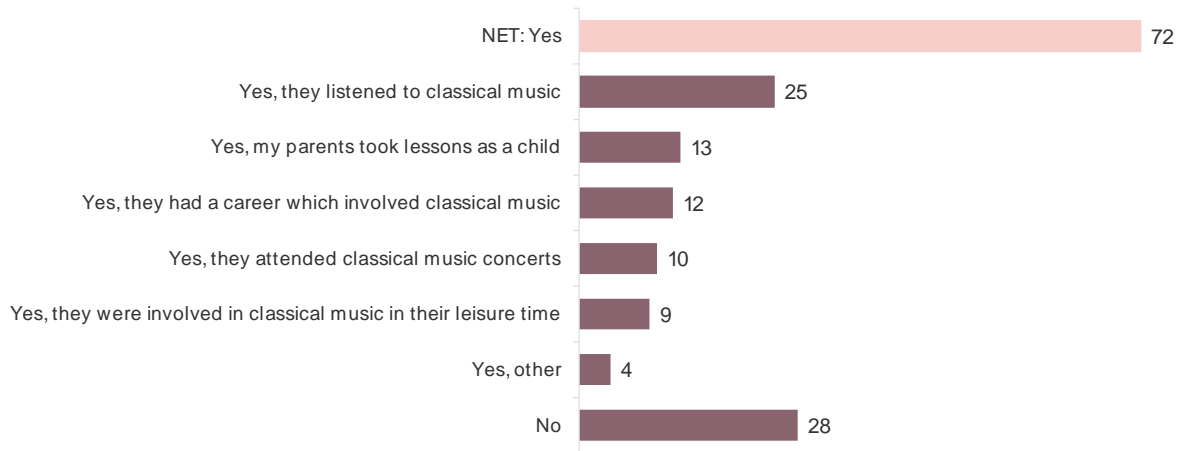
Analysing the different groups, **respondents who identify as LGBTQ+ were less likely than heterosexual or straight respondents to have parents with higher education qualifications.** Six in ten LGBTQ+ respondents have/had parents with such qualifications (60%), compared to just under seven in ten heterosexual respondents (68%). Please note the relatively low base size of those who identify as LGBTQ+ and take this into consideration when interpreting this analysis.

Elsewhere, respondents who were in the lower social grades when growing up were much less likely than respondents in the higher social grades to have had parents with higher education qualifications. One in five C2DE respondents have/had parents with higher education qualifications (21%), compared to three-quarters of ABC1 respondents (75%).

The **majority of survey respondents also had parents who had an interest in classical music when they (that is, the respondents not the parents) were growing up.** Just over seven in ten respondents said that their parents had an interest in classical music when they were growing up (72%), while just under three in ten said that their parents did not have such an interest (28%).

Breaking down what form this interest took, a quarter of respondents said that their parents **listened to classical music** (25%), while around one in ten said that their parents **took lessons as a child** (13%), **attended classical music concerts** (10%), and **were involved in classical music in their leisure time** (9%). Just over one in ten respondents said that their parents **had a career which involved classical music** (12%).

Figure 4.5: Parents' interest in classical music (%)



DPARb. Do/ did your parents (including natural parents, adoptive parents, step-parents or guardians) have an interest in classical music when you were growing up? Base: All respondents (967)

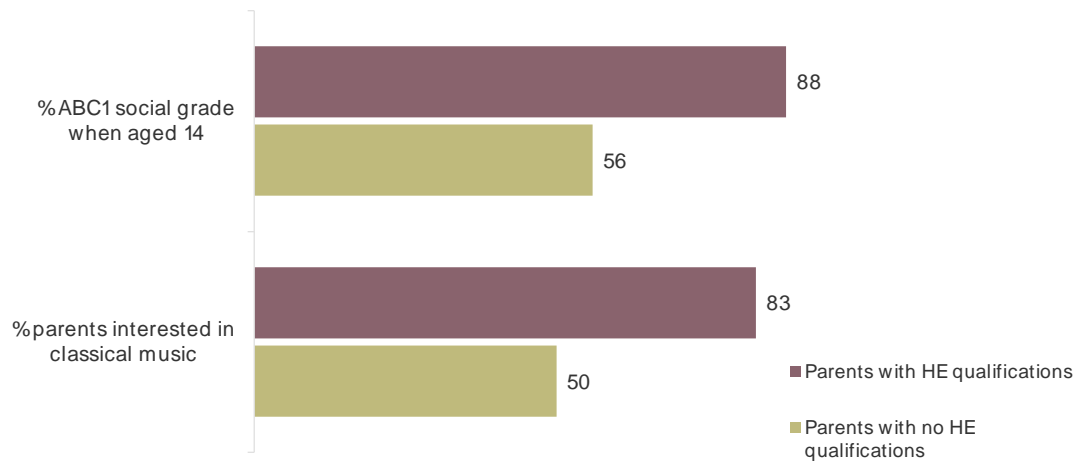


Looking at which groups were more likely to have parents who were interested in classical music, the data shows that **LGBTQ+ respondents were less likely than heterosexual respondents to have parents interested in classical music**. Just under six in ten LGBTQ+ respondents said that their parents have/had an interest in classical music (58%), while three-quarters of heterosexual or straight respondents said the same (75%). In terms of differences by ethnicity, white respondents were three times as likely as Black, Asian or other ethnically diverse respondents to have parents who have/had a career which involved classical music (13% vs. 4%).

Performers are significantly more likely to have had a parent interested in classical music when they were growing up. Eight in ten players said they had a parent interested in classical music when they were growing up (81%) compared with 63% of non-players.

Overall, **having parents interested in classical music, having parents with higher education qualifications, and being in a higher social grade all seem to be closely related**. Those respondents with parents who have higher education qualifications are more likely to be in the higher social grades and to have parents who are interested in classical music. While causation cannot be established, there is a correlation between these three variables.

Figure 4.6: Relationship between social grade, parents' education, and parents' interest in classical music (%)



DSEG. Finally, we would like to understand a little bit more about your background. Please select the occupation of the main/ highest income earner in your household when you were 14 years old. Base: All respondents (967)
 DPAR. Do/ did your parents (including natural parents, adoptive parents, step-parents or guardians) have any higher education qualifications such as a degree diploma or certificate of higher education? Base: All respondents (967)
 DPARb. Do/ did your parents (including natural parents, adoptive parents, step-parents or guardians) have an interest in classical music when you were growing up? Base: All respondents (967)

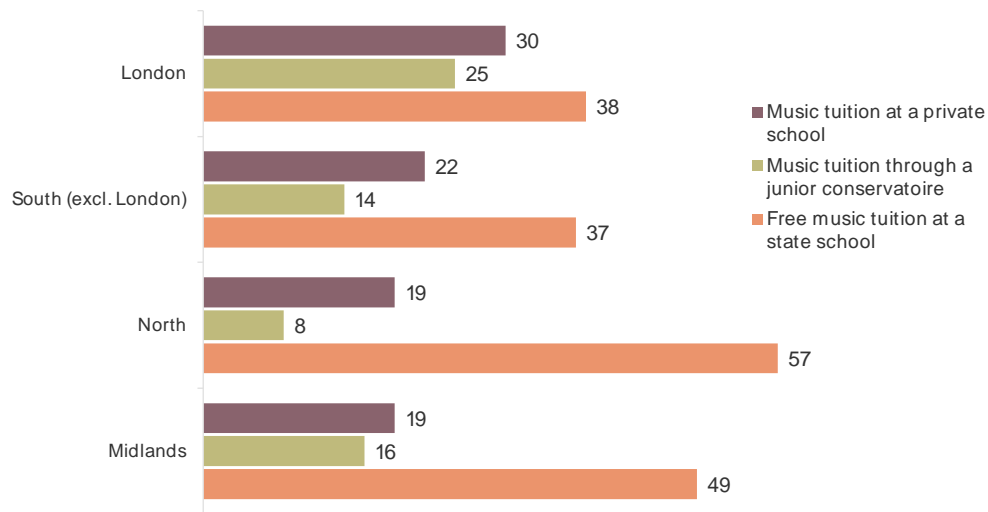
The impact of factors relating to upbringing

This section looks at the impact of the factors related to upbringing – place of birth, education of parents, social grade when growing up, parents' interest in classical music when growing up – on opportunities undertaken and barriers faced. The section also looks at whether these upbringing factors have an impact on whether or not a respondent has a role which primarily involves playing and performing with an instrument.

When it comes to place of birth, a greater proportion of those respondents who were born in London and the Midlands than those born in the North have a role that involves playing and performing with an instrument. Over half of those born in London (55%) and the Midlands (59%) said that their current role involves playing an instrument, compared to four in ten of those born in the North of England (39%).

With regard to opportunities, those born in London were more likely than those born elsewhere in the UK to have had **music tuition at a private school** (30%) and **music tuition through a junior conservatoire** (25%).

Figure 4.7: Opportunities by region of birth in England (%)



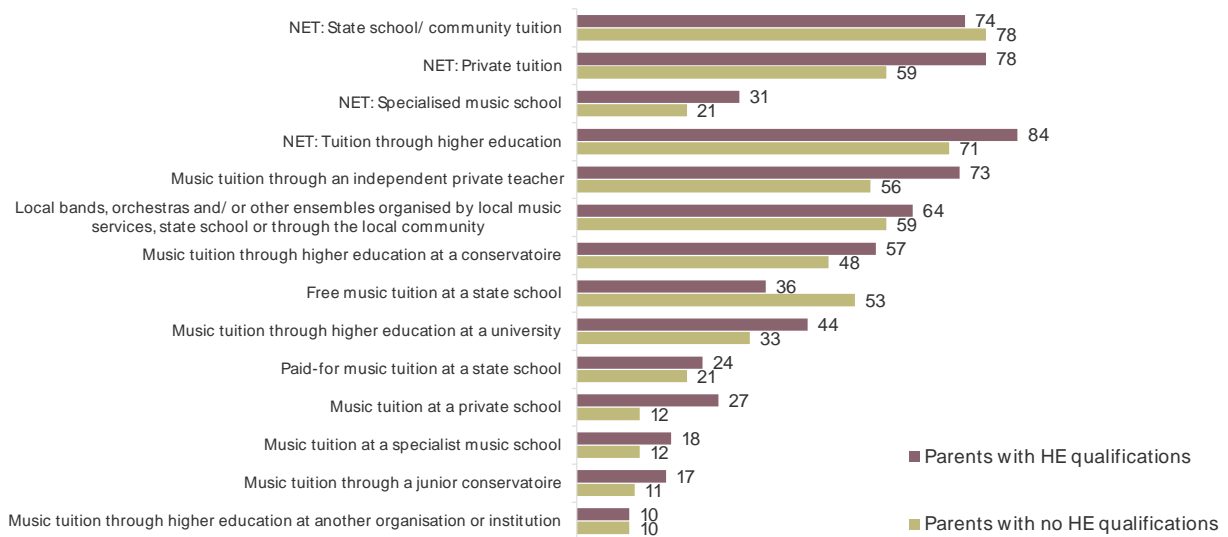
Q6.Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents born in London (172); All respondents born in the South (excl. London) (251); All respondents born in the North (155); All respondents born in the Midlands (134)

Despite these regional differences, across the different regions in the UK, there were no statistically significant differences in the proportion of respondents who said that there are or have been barriers to their career or aspirations for the future. However, those born outside the UK were much more likely than those born inside the UK to agree that they feel or have felt barriers restricting the opportunities available to them. Half of those born outside the UK agreed that there are or have been barriers (51%), compared to fewer than four in ten respondents born in the UK (38%).

The results suggest that the **impact on opportunities of having parents with higher education qualifications is more pronounced than the impact of where someone is born**. For instance, those with parents with higher education qualifications were more likely than those with parents without such qualifications to have a role that primarily involves playing or performing with an instrument. Over half of those with parents who have higher education qualifications play an instrument as part of their current role (54%), compared to less than half of those whose parents do not have higher education qualifications (47%).

Moreover, those with parents with higher education qualifications tended to have benefitted from a wider range of training and education opportunities. On average, those with parents with higher education qualifications undertook 3.8 opportunities as part of their training and education, compared to 3.4 opportunities among those whose parents did not have such qualifications. Indeed, the only opportunity that respondents whose parents do not have higher education qualifications were more likely to have had than respondents whose parents did have such qualifications was **free music tuition at a state school** (53% vs. 36%). As the chart shows below, for all other opportunities, respondents without highly educated parents were either equally likely or less likely than those with highly educated parents to have undertaken them. For instance, those with parents who have higher education qualifications were more likely than those without such parents to have undertaken some form of **private tuition** (78% vs. 59%).

Figure 4.8: Opportunities by parents' education qualifications (%)



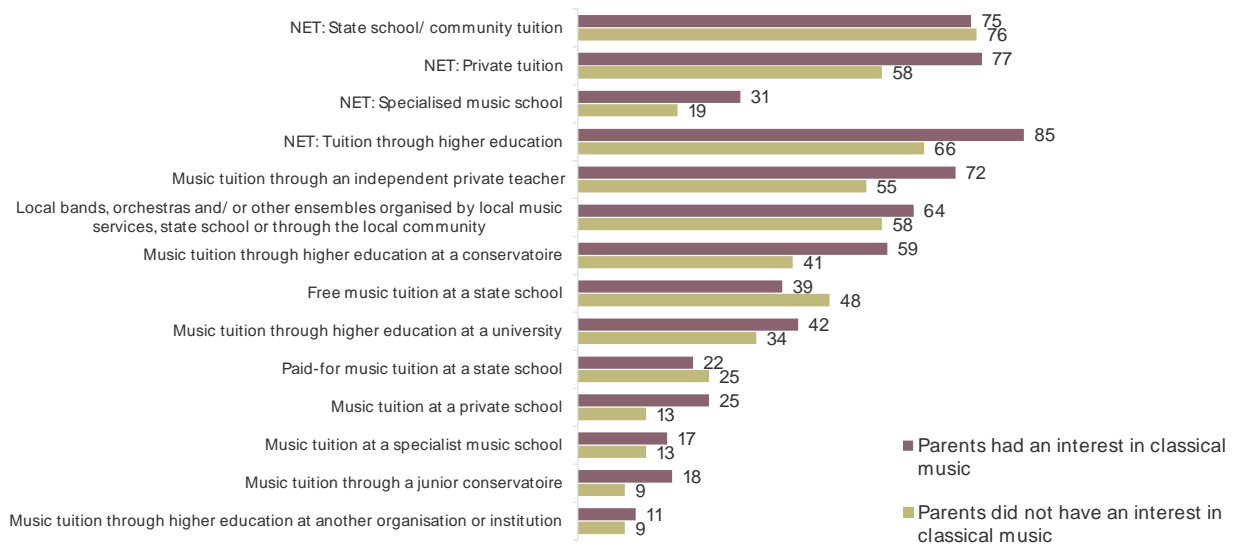
Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents whose parents have HE qualifications (638); all respondents whose parents do not have HE qualifications (316)

Despite benefitting from a wider range of opportunities, **respondents with parents who have higher education qualifications were just as likely as those with parents without higher education qualifications to agree that there are or have been barriers that restrict the opportunities available to them.** Four in ten respondents whose parents have higher education qualifications agree that there are or have been barriers (39%), the same proportion as among those whose parents have no such qualifications (40%).

As for the impact of having parents who have an interest in classical music, respondents who have such parents were more likely than those whose parents had no such interest to have a role which primarily involves playing and performing with an instrument. Just under six in ten of those whose parents have an interest in classical music have a role which primarily involves playing an instrument (58%), compared to fewer than four in ten of those with parents who do not have an interest in classical music (36%).

Those respondents with parents who have an interest in classical music also tended to benefit from more training and education opportunities. On average, those with parents interested in classical music undertook 3.8 opportunities, compared to 3.4 opportunities among those whose parents are not interested in classical music. Those with parents interested in classical music were more likely than those without such parents to have undertaken **private tuition** (77% vs. 58%), **tuition at a specialised music school** (31% vs. 19%), and **tuition through higher education** (85% vs. 66%). The only opportunity which those with parents not interested in classical music were significantly more likely to have had was **free music tuition at a state school**. Just under half of those with parents who are not interested in classical music undertook this opportunity (48%), compared to around four in ten of those whose parents do have an interest in classical music (39%).

Figure 4.9: Opportunities by parents' interest in classical music (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents with parents interested in classical music (696); all respondents with parents not interested in classical music (267)

Respondents who have **parents interested in classical music perceived fewer barriers restricting the opportunities available to them**. Four in ten respondents whose parents have an interest in classical **disagreed** that there are or have been barriers (39%), compared to three in ten of those whose parents have no such interest (30%).

The **impact of social grade when growing up is slightly less pronounced than the impact of having parents with higher education qualifications and of having parents with an interest in classical music**. For example, those respondents in social grade C2DE when growing up were no less likely than those in the higher social grades – ABC1 – to play and perform with an instrument in their current role (52% vs. 51%). Similarly, those in the lower social grades when growing up were no more likely than those in the higher grades to agree that there are or have been barriers restricting the opportunities available to them (40% of ABC1 respondents vs. 38% of C2DE respondents).

However, those respondents in the higher social grades – ABC1 – were more likely than those in the C2DE grade when growing up to have undertaken **private music tuition** (76% vs. 56%) and **tuition through higher education** (81% vs. 72%). The only opportunity that C2DE respondents were more likely to have undertaken was **free music tuition at a state school**. Over half of C2DE respondents had this (56%), compared to around four in ten of those who were in the ABC1 social grades when growing up (39%).

5 CURRENT ROLE IN THE CLASSICAL MUSIC SECTOR

This section looks at the current role of those that responded to the survey in the classical music sector. In particular, it looks at the nature of the current work of survey respondents as well as looking at whether or not their role primarily involves playing and performing with an instrument. For those respondents who work in administration, the section explores what area of function they work in. Finally, for all survey respondents, it looks at how many years they have been in the classical music sector.

The chapter finds that the majority of survey respondents **work with an orchestra and/or other large instrumental music ensemble**, making it the most common answer when respondents were asked what best describes their current work. It also finds that there was an even split between the proportion of respondents who do and do not play an instrument as part of current role and that the vast majority of survey respondents have been involved in the classical music sector for **over five years**, with half being involved for **over 15 years**.

Throughout, there were clear differences between male and female respondents with regard to their role in the classical music sector. We have not reported on those who identify as non-binary as they only make up one per cent of the survey respondents.

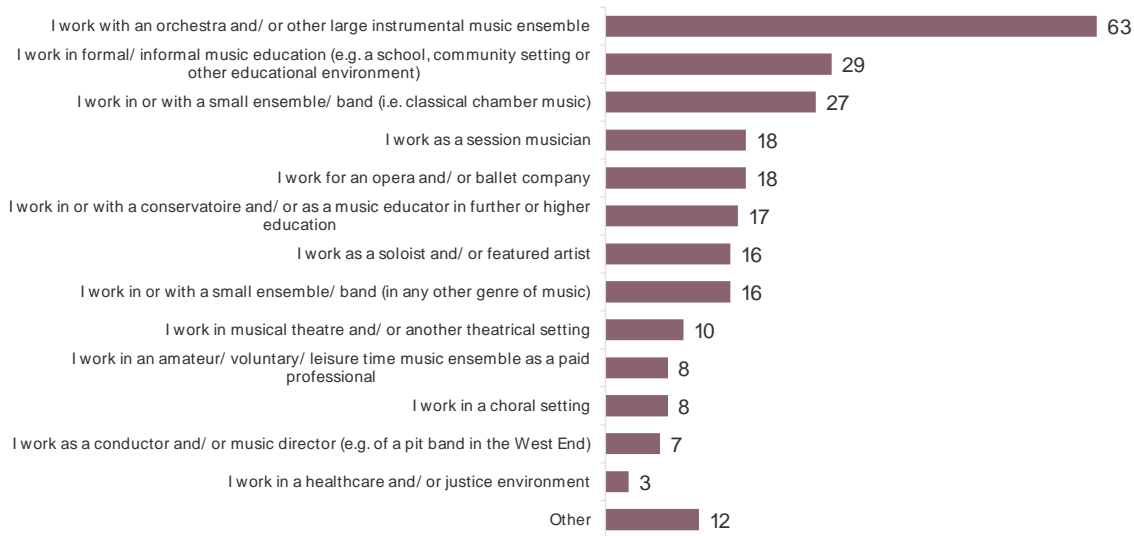
Men who responded to the survey were more likely than women to **work with an orchestra and/or other large instrumental music ensemble**, more likely **to play or perform with an instrument as part of their current role**, more likely **to hold senior administration positions** such as CEO and artistic director, and more likely **to have been involved in the sector for a longer period of time**. The number of people who identify as non-binary is too low to be able to conduct analysis on.

The overall picture

The majority of respondents to the survey **work with an orchestra and/or other large instrumental music ensemble** (63%), making it the most common answer when respondents were asked what best describes their current work within the music sector. Around three in ten respondents **work in formal or informal music education (for instance, a school, community setting or other educational environment)** (29%), and a similar proportion **work in or with a small ensemble/band (i.e. classical chamber music)** (27%).

Around one in five respondents **work as a session musician** (18%), the same proportion as **work for an opera and/or ballet company** (18%). Fewer than one in five survey respondents **work in or with a conservatoire and/or as a music educator in further or higher education** (17%) or **work as soloist and/or featured artist** (16%).

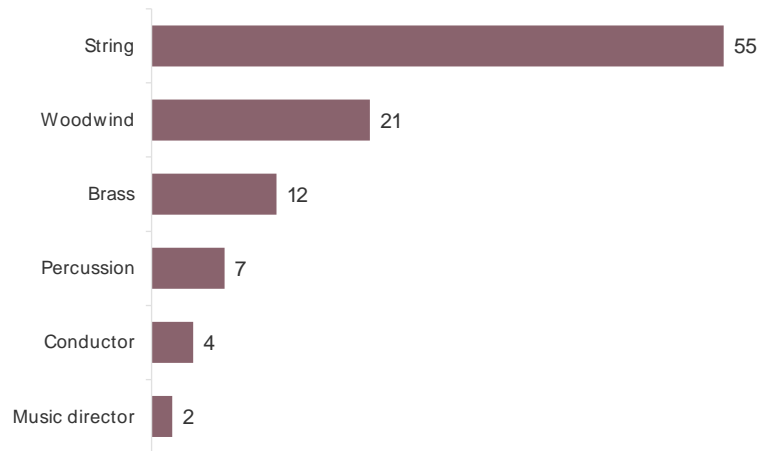
Figure 5.1: Nature of current work within the music sector (%)



Q1. Which of these best describes your current work within the music sector whether as a performer, administrator or in another capacity? Base: All respondents (967)

There was a roughly even split between the number of survey respondents whose current role in the classical music sector primarily involves playing and performing with an instrument and the number whose current role does not involve playing an instrument (52% vs. 48%). Among those who do play an instrument as part of their role, over half play a **string** instrument (55%), with the single most common instrument being the **violin**, played by over one in five respondents (22%). One in five respondents play a **woodwind** instrument (21%), while around one in ten play a **brass** instrument (12%) and closer to one in twenty play a **percussion** instrument (7%).

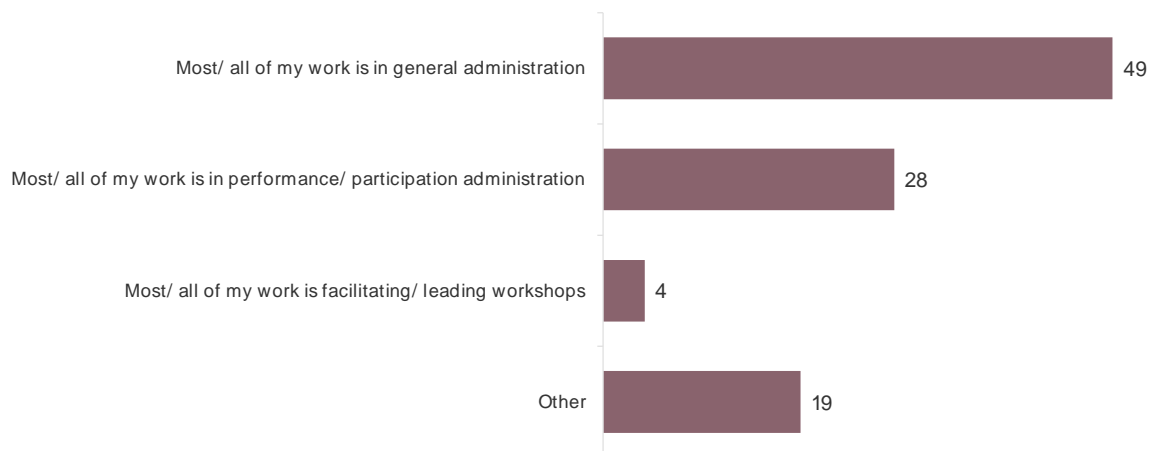
Figure 5.2: Type of instrument played as part of role (%)



Q2. Does your current role in the classical music sector primarily involve playing and performing with an instrument? Base: All those playing an instrument (499)

Of those whose current role does not involve playing and performing with an instrument, the vast majority said that most or all of their work is in administration, whether this be **general administration** (49%) or **performance or participation administration** (28%).

Figure 5.3: Work of those whose role does not primarily involve playing an instrument (%)



Q3. Which of the following best describes your current work within the classical music sector? Base: All those not playing an instrument (468)

The most common area of function for those working in administration is **professional services (for example, finance, HR, marketing, IT, and fundraising)**, with three in ten of those working in administration working in this area of function (31%). Around one in seven of those working in administration said that their area of function is **learning and participation** (14%), the same proportion whose area of function is **orchestral management or librarian** (14%). One in ten of those working in administration said that they are **CEOs** (11%), while just under one in ten said that they are an **artistic director or senior programmer or music director** (8%). Two in ten responded 'other' to the question, these included a range of responses with 'production/producer' most mentioned (by ten respondents).

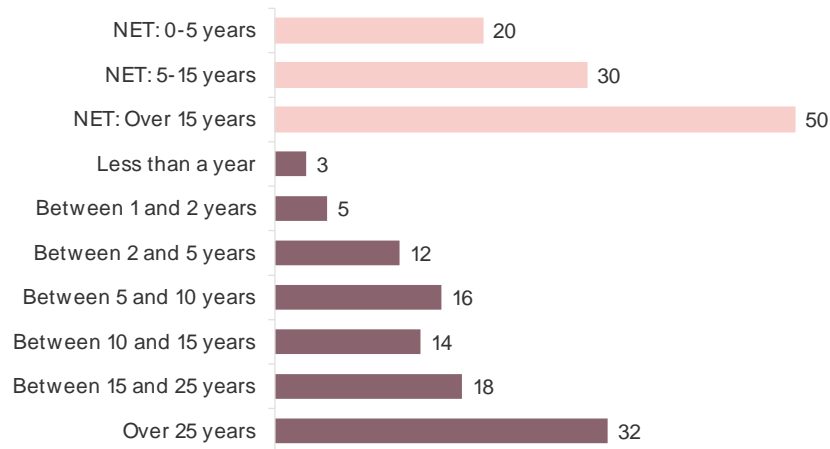
Figure 5.4: Area of function of those working in administration (%)



Q4. And which of the following best describes your area of function? Base: All those working in administration (360)

In terms of the length of time that respondents have been involved in the classical music sector, half of all survey respondents have been involved for **over 15 years** (50%), with just under two in ten being involved for **between 15 and 25 years** (18%) and just over three in ten being in the sector for **over 25 years** (32%). One in five respondents have been involved in the sector for **fewer than 5 years** (20%), while three in ten have been involved in the sector for **between 5 and 15 years** (30%).

Figure 5.5: Number of years involved in the classical music sector (%)



Q5. How many years have you been involved in the classical music sector? Base: All respondents (967)

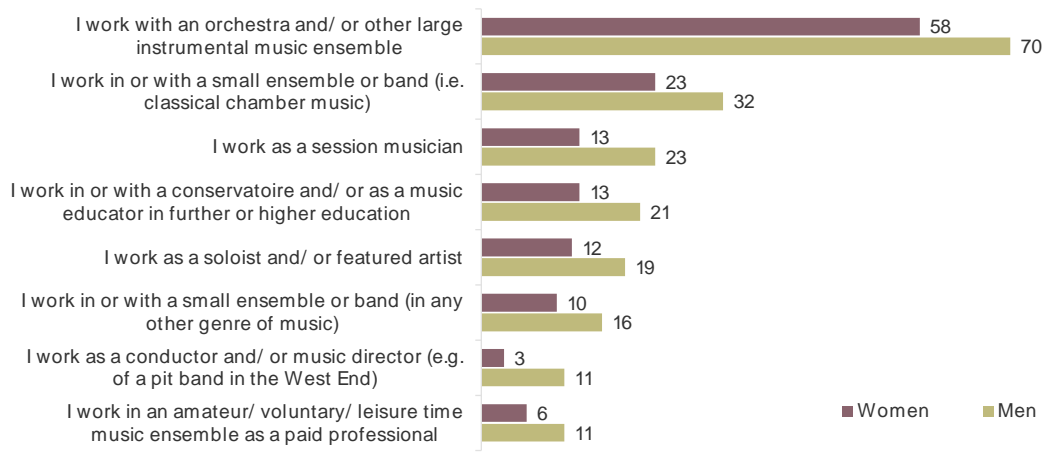
The nature of current work roles among different groups

Nature of current work

With regard to the nature of respondents' current work within the music sector, there were some clear differences by gender. Across the roles tested, male respondents were consistently more likely than female respondents to say that roles applied to them. For instance, male respondents were more likely than female respondents to say that they **work with an orchestra and/or other large instrumental music ensemble**, with seven in ten men saying that this applied to them (70%), compared to just under six in ten women (58%).

Similarly, men were more likely than women to **work in or with a small ensemble or band**, whether this be **classical chamber music** (32% vs. 23%) or **in any other genre of music** (16% vs. 10%). Men were also more likely than women to work in more individual roles, such as **working as a session musician** (23% vs. 13%), **working as a soloist and/or featured artist** (19% vs. 12%), and **as a conductor and/or music director (for example, of a pit band in the West End)** (11% vs. 3%).

Figure 5.6: Nature of work by gender (%)

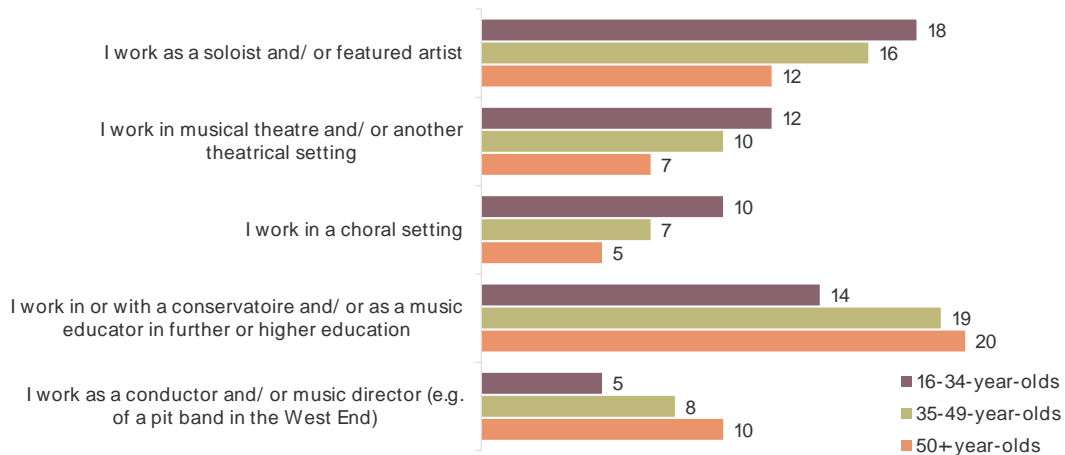


Q1. Which of these best describes your current work within the music sector whether as a performer, administrator or in another capacity? Base: All female respondents (521); All male respondents (422)

The roles that men were not more likely than women to say that they applied to them related to **working in formal or informal music education** – not including conservatoires or further or higher education, **working for an opera and/or ballet company**, **working in a choral setting**, **working in musical theatre and/or another theatrical setting**, and **working in a healthcare and/or justice environment**.

Across the different types of work tested, there were few differences by age. However, 16-34-year-old respondents were slightly more likely than respondents aged 50 or over to **work as a soloist and/or featured artist** (18% vs. 12%), to **work in musical theatre and/or another theatrical setting** (12% vs. 7%), and to **work in a choral setting** (10% vs. 5%). Meanwhile, respondents aged 50 or over were more likely to **work as a conductor and/or music director** (10% vs. 5%) and to **work in or with a conservatoire and/or as a music educator in further or higher education** (20% vs. 14%).

Figure 5.7: Nature of work by age (%)



Q1. Which of these best describes your current work within the music sector whether as a performer, administrator or in another capacity? Base: All respondents aged 16-34 (416); All respondents aged 35-49 (279); All respondents aged 50+(263)

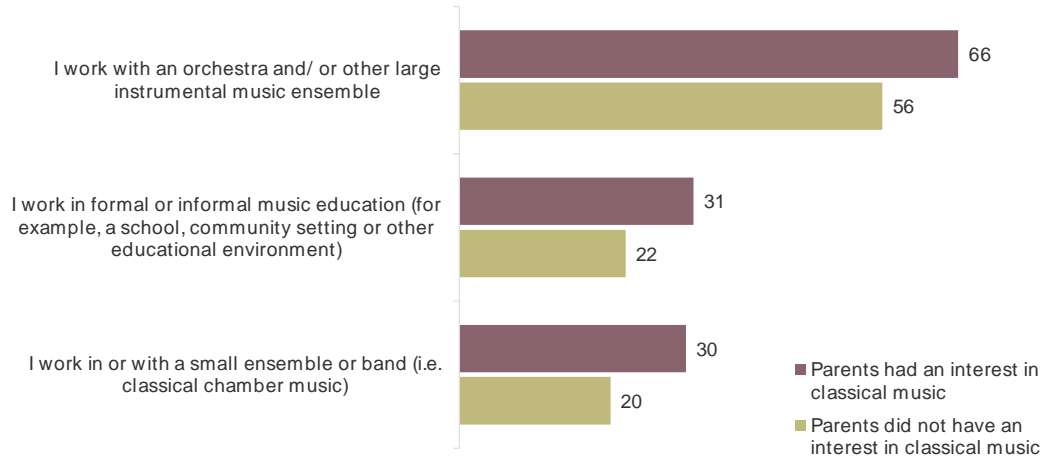
As for differences by sexuality, heterosexual respondents were more likely than LGBTQ+ respondents to **work with an orchestra and/or other large instrumental music ensemble** (65% vs. 52%), while respondents who identify as LGBTQ+ were twice as likely as heterosexual respondents to **work in a choral setting** (12% vs. 6%).

Comparing the results by ethnicity, Black, Asian and other ethnically diverse respondents were more likely than white respondents to **work as a session musician** and **as a soloist and/or featured artist**. Nearly three in ten Black, Asian and other ethnically diverse respondents **work as a session musician** (27%), compared to fewer than two in ten white respondents (17%). Similarly, around a quarter of Black, Asian and other ethnically diverse respondents said that they **work as a soloist and/or featured artist** (24%), compared to 15 per cent of white respondents. Black, Asian and other ethnically diverse respondents were also twice as likely as white respondents to **work in or with a small ensemble band (in a non-classical genre of music)** (24% vs. 12%).

For this question, there were no statistically significant differences between the responses of disabled and non-disabled respondents or between respondents who were in the lower social grades and higher social grades when growing up. However, there were some significant differences according to the level of classical music interest of respondents' parents. Those respondents whose parents had an interest in classical music when they were growing up were more likely than those whose parents were not interested in classical music to **work with an orchestra and/or other large instrumental ensemble** (66% vs. 56%), to **work in formal or informal music education (for example, a school, community setting or other educational environment)** (31% vs. 22%), and to **work in or with a small ensemble or band (i.e. classical chamber music)** (30% vs. 20%).

Please note the relatively low base sizes of these groups and take this into consideration when interpreting this analysis.

Figure 5.8: Nature of work by parents' interest in classical music (%)

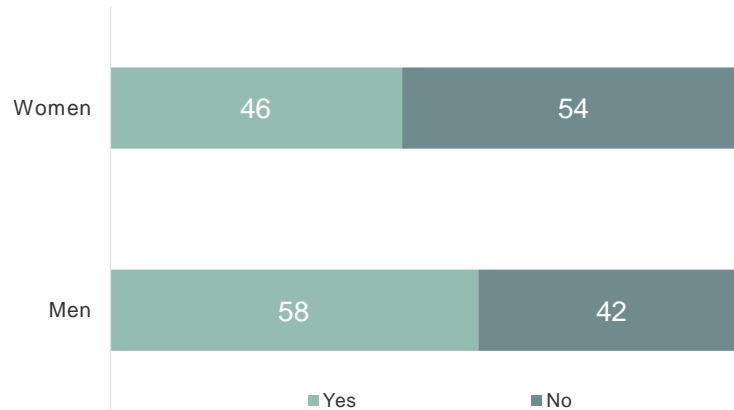


Q1. Which of these best describes your current work within the music sector whether as a performer, administrator or in another capacity? Base: All respondents whose parents had an interest in classical music (696); All respondents whose parents did not have an interest in classical music (267)

Playing and performing with an instrument

When it comes to whether or not respondents' current role in the classical music sector primarily involves playing and performing with an instrument, male respondents were more likely than female respondents to have a role that involves playing an instrument. Just under six in ten men said that their current role involves playing and performing with an instrument (58%), compared to fewer than half of female respondents (46%).

Figure 5.9: Playing with an instrument as part of current role by gender (%)

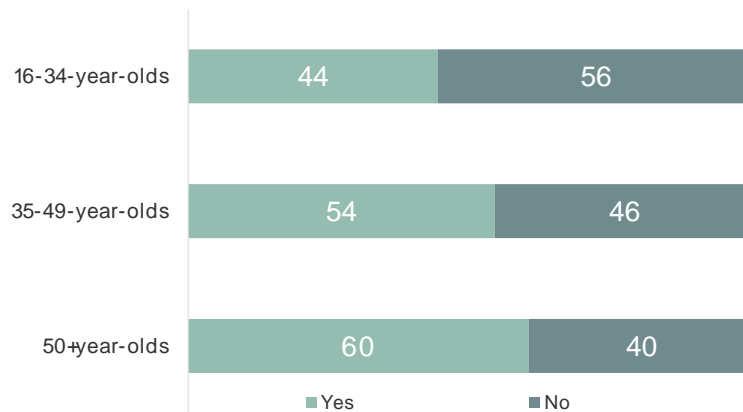


Q2. Does your current role in the classical music sector primarily involve playing and performing with an instrument? Base: All female respondents (521); all male respondents (422)

Among those who do play an instrument as part of their role, there were also differences between male and female respondents in terms of the type of instrument they play. Women were more likely than men to play a **string** instrument, with just under seven in ten female respondents who perform with an instrument saying that this instrument was a string instrument (67%), compared to around four in ten men (41%). Within this, women were twice as likely as men to play the **violin** (30% vs. 15%). Meanwhile, among respondents who play an instrument as part of their current role, men were more likely than women to play a **percussion** instrument (10% vs. 3%) and a **brass** instrument (17% vs. 7%).

Older respondents were more likely than younger respondents to have a role that primarily involves playing and performing with an instrument, with six in ten of those aged 50 or over playing an instrument as part of their role (60%), compared to fewer than half of 16-34-year-olds (44%).

Figure 5.10: Playing with an instrument as part of current role by age (%)



Q2. Does your current role in the classical music sector primarily involve playing and performing with an instrument? Base: All respondents aged 16-34 (416); all respondents aged 35-49 (279); all respondents aged 50+ (263)

While the difference was not statistically significant, the results suggest that Black, Asian and other ethnically diverse respondents were more likely than white respondents to have a role that primarily involves performing with an instrument. Six in ten Black, Asian and other ethnically diverse respondents said that their current role primarily involves playing an instrument (60%), compared to half of white respondents who said the same (51%). When it comes to the type of instrument played, there were very few differences between Black, Asian and other ethnically diverse respondents and white respondents. However, Black, Asian and other ethnically diverse respondents who play an instrument as part of their role were more likely than white respondents to play the **violin**, with nearly double the proportion of Black, Asian and other ethnically diverse respondents playing this instrument (38%) compared to white respondents (20%).

As with ethnicity, there was a non-significant difference between heterosexual respondents and respondents who identify as LGBTQ+. Over half of heterosexual respondents said that their current role primarily involves playing an instrument (53%), compared to fewer than half of LGBTQ+ respondents (46%). There were, however, a couple of significant differences by sexuality when it comes to the type of instrument played. LGBTQ+ respondents were nearly twice as likely as heterosexual respondents to play a **woodwind** instrument (35% vs. 18%). Heterosexual respondents were more likely than LGBTQ+ respondents to play a **string** instrument (57% vs. 44%).

Please note the relatively low base sizes of these groups and take this into consideration when interpreting this analysis.

With regard to whether or not their current role involved playing an instrument, there were no statistically significant differences between disabled and non-disabled respondents or between respondents in the ABC1 social grades when growing up and respondents in the C2DE social grades. However, there was a big difference between respondents with parents who were

interested in classical and those with parents who were not. Just under six in ten of those with parents interested in classical music said that their current role primarily involves playing and performing with an instrument (58%), compared to fewer than four in ten of those whose parents did not have an interest in classical music (36%).

Looking at the types of instrument played, those with parents interested in classical music were more likely than those with parents not interested to play a **string** instrument (57% vs. 45%), but were less likely to play a **percussion** instrument (6% vs. 10%). Among those whose role involves playing an instrument, there is a similar pattern with regard to social grade, with respondents who were in the lower social grades – C2DE – when growing up, being more likely than those in the ABC1 social grades to play a **percussion** instrument (13% vs. 6%).

Area of function of those working in administration

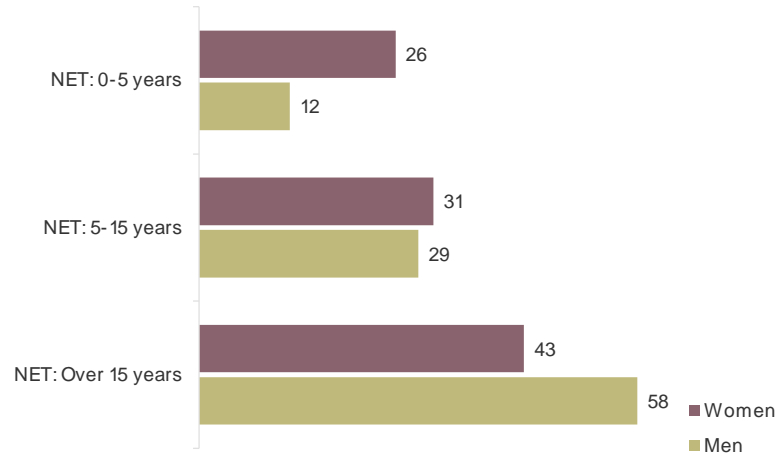
Among those respondents whose role does not involve playing an instrument and who work in administration, male respondents are more likely than female respondents to work as **CEOs** and **artistic directors/senior programmers/music directors**. Men working in administration are more than twice as likely as women working in administration to be **CEOs** (18% vs. 7%) and are around five times more likely to be **artistic directors/senior programmers/music directors** (16% vs. 3%). Women working in administration were more likely than men to work in the area of **learning and participation**, with around two in ten women in administration working in this area (19%), compared fewer than one in ten men (8%).

Looking at the areas of function across the different age groups, those aged 16-34 and working in administration were more likely than those aged 50 or over to be working in **learning and participation**, with just under two in ten 16-34-year-olds working in this area (17%), compared to just under one in ten of those aged 50 or over (7%). Older respondents working in administration were much more likely than younger respondents to hold positions of higher seniority. For instance, just over one in five of those aged 50 or over working in administration were **CEOs** (22%), compared to two per cent of those aged 16-34. Similarly, among those working in administration, those aged 50 or over were four times as likely as those aged 16-34 to be **artistic directors/senior programmers/music directors** (16% vs. 4%).

Number of years involved in the classical music sector

With regard to the length of time that respondents have been involved in the classical music sector, male respondents were more likely than female respondents to have been involved in the classical music sector for longer. Just under six in ten men said that they have been in the classical music sector for **over 15 years** (58%), compared to closer to four in ten women (43%). This difference is driven by the proportion of men who have been in the sector for **over 25 years**, with four in ten men saying that they have been in the sector for this longer (40%), compared to only around a quarter of women (26%). Relatedly, women are more likely than men to have worked in the sector for **less than five years**, with around a quarter of women being involved in the sector for this long (26%), compared to just over one in ten men (12%).

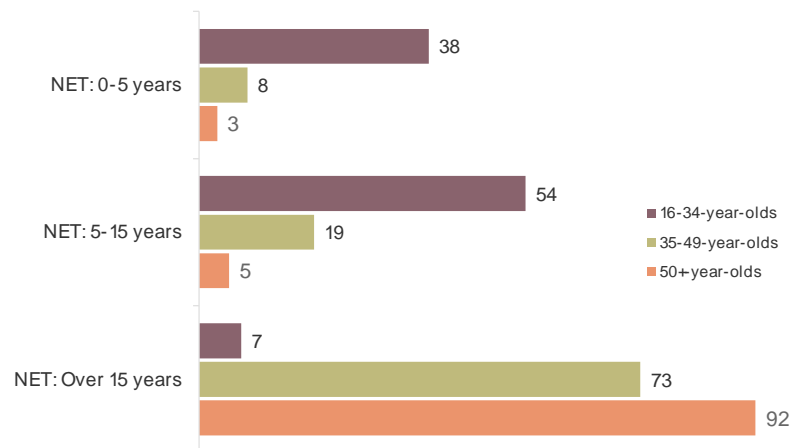
Figure 5.11: Number of years involved in the classical music sector by gender (%)



Q5. How many years have you been involved in the classical music sector? Base: All female respondents (521); all male respondents (422)

There is also a very pronounced pattern by age, with – as might be expected – older respondents far more likely than younger respondents to have been in the sector for a longer amount of time.

Figure 5.12: Number of years involved in the classical music sector by age (%)

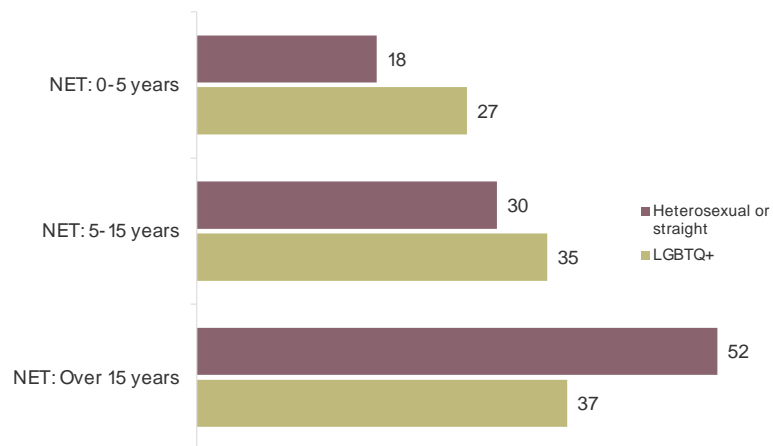


Q5. How many years have you been involved in the classical music sector? Base: All respondents aged 16-34 (416); All respondents aged 35-49 (279); All respondents aged 50+(263)

As the chart above shows, there is an inevitable strong correlation between age and number of years in the classical music sector. As such, age is an important factor to bear in mind when analysing the results for different sub-groups at this question. The profiles of female respondents, Black, Asian and other ethnically diverse respondents, and LGBTQ+ respondents were all relatively young. Therefore, the differences we see for gender, ethnicity, and sexuality in terms of number of years involved in the classical music sector are likely to be driven, at least in part, by age.

Bearing this in mind, there are differences by both ethnicity and sexuality when it comes to the number of years respondents have been involved in the classical music sector. Heterosexual respondents are more likely than LGBTQ+ respondents to have been involved in the sector for a longer period of time. Just over half of heterosexual respondents have been involved in the classical music sector for **over 15 years** (52%), compared to fewer than four in ten LGBTQ+ respondents (37%). Similarly, LGBTQ+ respondents were more likely than heterosexual or straight respondents to have been involved for **less than five years** (27% vs. 18%).

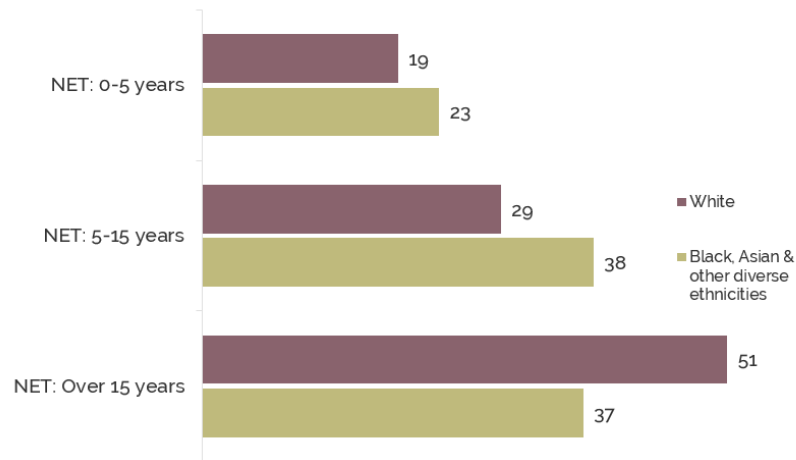
Figure 5.13: Number of years involved in the classical music sector by sexuality (%)



Q5. How many years have you been involved in the classical music sector? Base: All heterosexual or straight respondents (744); all LGBTQ+ respondents (186)

As for ethnicity, white respondents were more likely than Black, Asian and other ethnically diverse respondents to have been involved in the classical music sector for **over 15 years**, with half of white respondents being involved in the sector for this long (51%), compared to fewer than four in ten Black, Asian and other ethnically diverse respondents (37%).

Figure 5.14: Number of years involved in the classical music sector by ethnicity (%)



Q5. How many years have you been involved in the classical music sector? Base: All white respondents (862); all Black and minority ethnic respondents (93)

While there were no statistically significant differences by disability or by social grade, those with parents interested in classical music were more likely than those whose parents had no such interest to have been involved in the classical music sector for longer. Over half of those with parents interested in classical music said that they have been involved in the classical music sector for **over 15 years** (54%), compared to around four in ten of those whose parents were not interested in classical music when they were growing up (41%).

Please note the relatively low base sizes of these groups and take this into consideration when interpreting this analysis.

6 THE ROLE OF TRAINING AND EDUCATION

This section looks at the opportunities that people who responded to the survey undertook as part of their training and education in music. It explores the proportion of survey respondents who undertook state school or community music tuition and the proportion who undertook private tuition. It also looks at specific opportunities within these umbrella terms, such as free music tuition at a state school, as well as looking at tuition opportunities at higher education institutions.

The section finds that a similar proportion of respondents undertook private tuition – either through an independent private teacher or at a private school – as undertook state school or community tuition, including free and paid-for music tuition at a state school and opportunities within local bands, orchestras and/or other ensembles organised by local music services, a state school or through the local community.

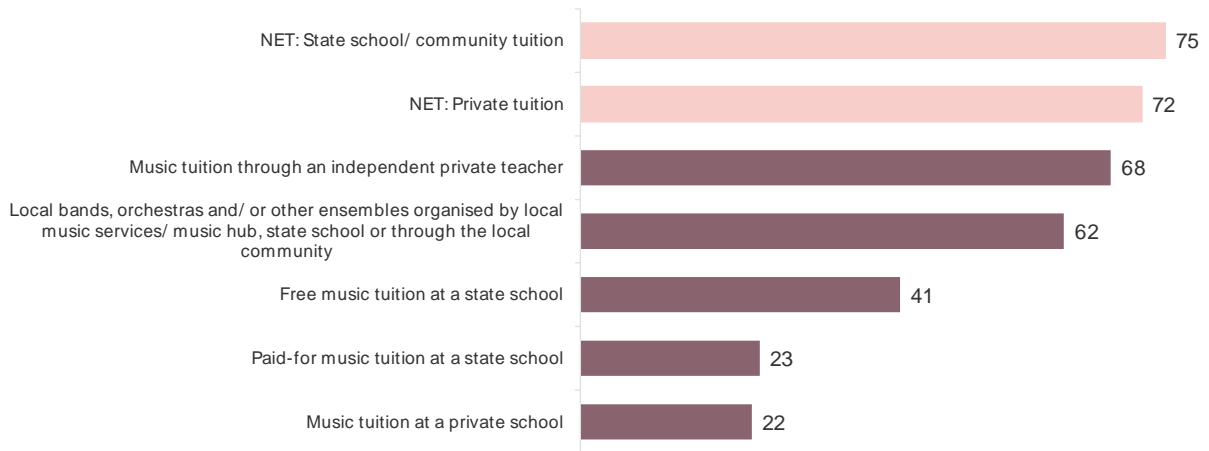
The section also finds that respondents aged 50 or over were more likely than those aged under 50 to have had free music tuition at a state school, with the opposite pattern being the case for paid-for music tuition at a state school. The social grade and level of interest in classical music of respondents' parents had an important bearing on the training and education opportunities undertaken. Those with parents in the higher social grades were more likely than those with parents in the lower social grades to have undertaken private tuition opportunities.

The overall picture

A similar proportion of survey respondents undertook private music tuition as undertook state school or community tuition. Indeed, just over seven in ten survey respondents had **private tuition** (72%) – either through an independent private teacher or at a private school – while three quarters of respondents undertook **state school or community tuition** (75%), comprising free music tuition at a state school, paid-for music tuition at a state school, as well as opportunities to play with local bands, orchestras and/or other ensembles organised by local music services, a state school or through the local community.

Looking in more detail at the specific opportunities within the umbrella terms of “private tuition” and “state school or community tuition”, the single most commonly undertaken opportunity among survey respondents as part of their training and education in music is **music tuition through an independent private teacher**, with just under seven in ten respondents having had this (68%). This was followed by participation in **local bands, orchestras and/or other ensembles organised by local music services, a state school or through the local community** (62%). Four in ten survey respondents undertook **free music tuition at a state school** (41%), almost double the proportion who undertook **paid-for music tuition at a state school** (23%) and **music tuition at a private school** (22%).

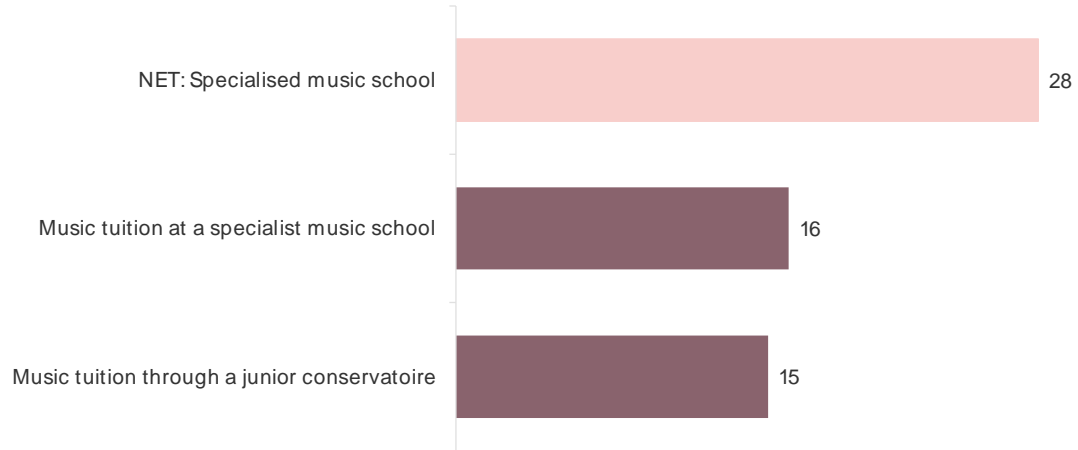
Figure 6.1: Training and education opportunities undertaken – state vs. private tuition (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents (967)

In terms of respondents’ training and education in music, both private tuition and state school or community tuition were more frequently undertaken than opportunities at a **specialised music school**. In total, just under three in ten survey respondents said that they had had music tuition at a specialised music school (28%), whether this be at a **specialist music school** (16%) or through a **junior conservatoire** (15%).

Figure 6.2: Training and education opportunities undertaken – specialised music school (%)

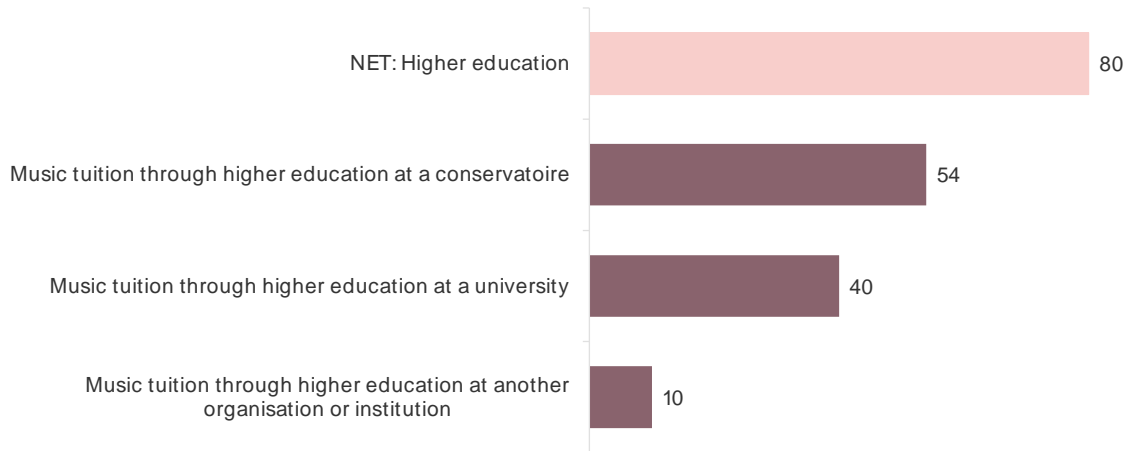


Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
Base: All respondents (967)

Looking at opportunities later on in a person’s education, the vast majority of survey respondents had **music tuition through a higher education institution** (80%). The most common form of such tuition was **music tuition through higher education at a conservatoire**, with over half of respondents having undertaken this (54%). Four in ten respondents said that they had **music tuition through higher education at a university** (40%), while one in ten had undertaken **tuition through higher education at another organisation or institution** (10%).

Players are significantly more likely to have attended a specialised music school (40%) compared with 14% of non-players. They are also more likely to have undertaken training at higher education level (93%) compared with 65% of non-players.

Figure 6.3: Training and education opportunities undertaken – tuition through higher education (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
Base: All respondents (967)

The role of training and education across different groups

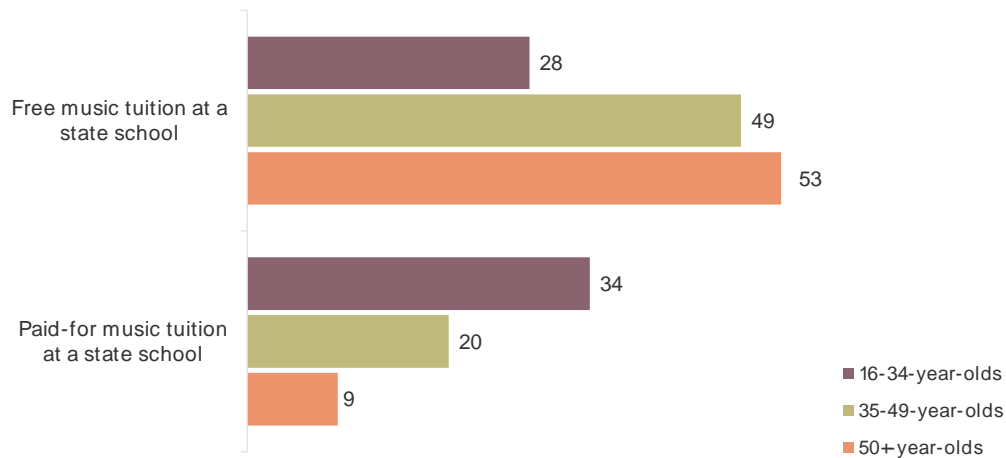
With regard to training and education opportunities, there are no statistically significant differences between male respondents and female respondents in terms of the proportions who have had state school or community tuition, private tuition, tuition at a specialised music school, or tuition through higher education. However, for a couple of specific opportunities, there were differences between the men and women who responded to the survey. For instance, female respondents were more likely than male respondents to have undertaken **paid-for music tuition at a state school**. Around one in four female respondents said that they had undertaken this opportunity (26%), compared to around one in five male respondents (19%). Male respondents, meanwhile, were more likely than female respondents to have had **music tuition through higher education at a conservatoire**, with six in ten male respondents saying that they had this (61%), compared to half of female respondents (49%).

Across the different age groups, respondents aged under 50 were more likely than respondents aged over 50 to have undertaken **private tuition** as part of their training and education in music. Three-quarters of 16-34-year-olds (75%) and 35-49-year-olds (75%) said that they had had private tuition in one form or another, compared to just under two-thirds of those aged 50 or over (63%). Looking at the specific opportunities under the umbrella of “private tuition”, seven in ten of those aged 16-34 (70%) and 35-49 (72%) have had **music tuition through an independent private teacher**, compared to just under six in ten of those aged 50+ (58%). Similarly, a quarter of 16-34-year-olds (25%) and over one in five 35-49-year-olds (22%) have had **music tuition at a private school** compared to 17 per cent of those aged 50 or over.

When it comes to tuition at a state school, a greater proportion of younger respondents have had **paid-for** tuition at the school than have had **free** tuition at the school. Around a third of 16-34-

year-olds said that they had had **paid-for music tuition at a state school** (34%), while just under three in ten had had **free music tuition at a state school** (28%). This pattern is flipped for respondents aged 35-49 and 50+, among whom free music tuition at a state school was much more common than paid-for music tuition at a state school. Indeed, half of 35-49-year-olds (49%) and over half of those aged 50 or over (53%) said that they had **free music tuition at a state school**, while only one in five (20%) and one in ten (nine per cent), respectively, said that they had **paid-for music tuition at a state school**.

Figure 6.4: Training and education opportunities by age – free vs. paid-for state school tuition (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: 16-34-year-olds (416); 35-49-year-olds (279); 50+-year-olds (263)

While there were very few statistically significant differences between LGBTQ+ respondents and heterosexual respondents with regard to training and education opportunities undertaken, there were differences by ethnicity. Black, Asian and other ethnically diverse respondents were nearly twice as likely as white respondents to have had **music tuition through a junior conservatoire**, with a quarter of Black, Asian and other ethnically diverse respondents having undertaken this opportunity (25%), compared to 14 per cent of white respondents. Meanwhile, white respondents were more likely than Black, Asian and other ethnically diverse respondents to have had **music tuition through higher education**. Eight in ten white respondents said that they had had music tuition through higher education (81%) – either at a conservatoire, a university, or another organisation or institution – compared to seven in ten Black, Asian and other ethnically diverse respondents (71%).

Please note the relatively low base sizes of these groups and take this into consideration when interpreting this analysis.

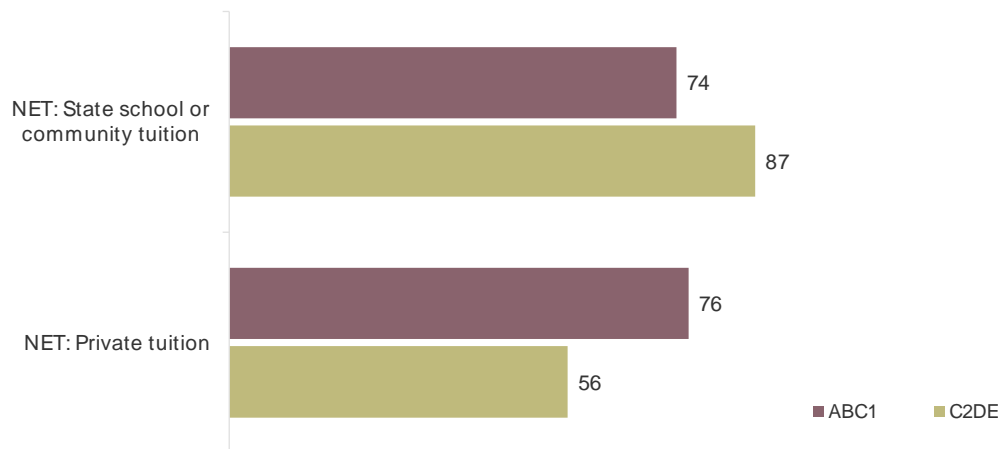
As for disabled respondents, the data indicates that they were less likely than non-disabled respondents to have had training or education at **junior conservatoires** and **higher education institutions**. Around one in twenty disabled respondents said that they had had music tuition through a junior conservatoire (four per cent), compared to around one in six non-disabled

respondents (16%) – that is, non-disabled respondents were four times as likely as disabled respondents to have had music tuition at a junior conservatoire. With regards to higher education opportunities, just over seven in ten disabled respondents said that they had had music tuition through higher education (72%) – at a conservatoire, university, or other institution – compared to eight in ten non-disabled respondents (81%).

There are some pronounced differences between the training and education opportunities of those with parents in the higher social grades and those with parents in the lower social grades. Respondents who were in the social grades ABC1 when they were aged 14 were more likely than those in social grades C2DE to have had **private tuition** of some form. Three-quarters of those in social grades ABC1 had **private tuition** (76%), compared to closer to half of those in social grades C2DE (56%).

In contrast, those in the lower social grades were more likely than those in the higher grades to have had **state school or community tuition**. Just under nine in ten of those in the C2DE social grades had **state school or community tuition** (87%), compared to around three-quarters of those in the ABC1 social grades (74%).

Figure 6.5: Training and education opportunities by social grade – private vs. state or community tuition (%)

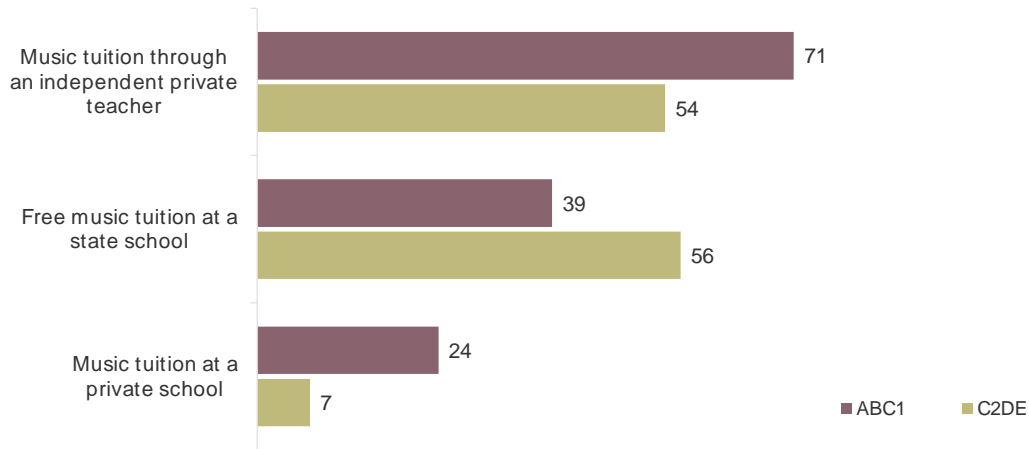


Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents in ABC1 social grades when aged 14 (749); all respondents in C2DE social grades when aged 14 (134)

Looking more deeply at specific opportunities, those in the higher social grades were more likely than those in the lower social grades to have had **music tuition through an independent private teacher** (71% vs. 54%). Those with in the ABC1 social grades were over three times as likely as those in the C2DE social grades to have had **music tuition at a private school** (24% vs. 7%).

A greater proportion of those in the C2DE social grades when they were growing up than those in the ABC1 grades undertook **free music tuition at a state school**. Over half of those in the C2DE social grades had **free music tuition at a state school** (56%), a figure that drops to four in ten of those in the ABC1 social grades (39%).

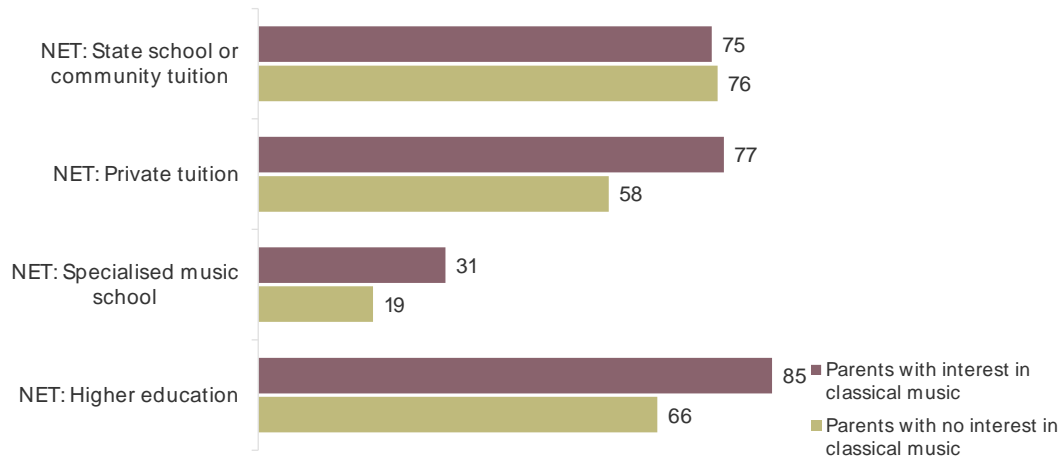
Figure 6.6: Training and education opportunities by social grade – specific private tuition and state tuition opportunities (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents in ABC1 social grades when aged 14 (749); all respondents in C2DE social grades when aged 14 (134)

We see a similar pattern when comparing the training and education opportunities of those with parents who had an interest in classical music and those with parents who had no such interest. Those survey respondents whose parents have an interest in classical music were more likely than those whose parents did not have such an interest to have had **private tuition, tuition at a specialised music school, and tuition through higher education**. Just under eight in ten respondents whose parents had an interest in classical music undertook some form of **private tuition** (77%), compared to just under six in ten of those with parents with no such interest (58%). Similarly, three in ten of those with parents interested in classical music had **tuition at a specialised music school** (31%), as against two in ten of those whose parents did not have an interest in classical music (19%). Lastly, over eight in ten of those with parents with a classical music interest undertook tuition through higher education (85%) – either at a conservatoire, university, or other institution – compared to two-thirds of those without such parents (66%).

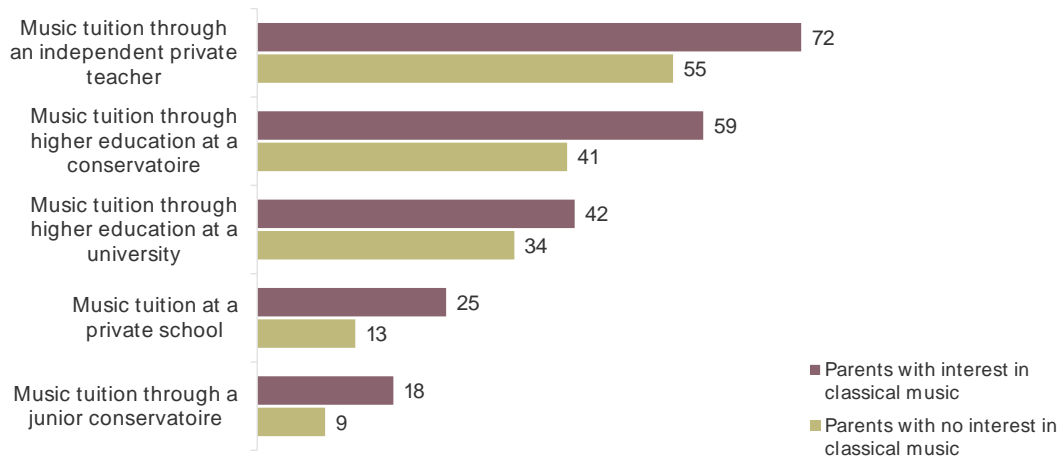
Figure 6.7: Training and education opportunities by classical music interest of parents (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents with parents interested in classical music (696); all respondents with parents not interested in classical music (267)

Overall, those respondents with parents with an interest in classical music undertook a greater number of training and education opportunities than those without such parents. The only opportunity that those with parents without an interest in classical music were more likely to have undertaken was **free music tuition at a state school**, with half having had this (48%), compared to four in ten of those with parents interested in classical music (39%). This specific opportunity is subsumed within the “NET: State school or community tuition” in Figure 7.7. Apart from this, there was no other opportunity that those with parents with no interest in classical music were significantly more likely to have undertaken. As the chart shows below, those with parents with an interest in classical music were more likely to have had **music tuition through an independent private teacher, tuition at a private school, tuition at a junior conservatoire, tuition through higher education at a university, and tuition through higher education at a conservatoire.**

Figure 6.8: Training and education opportunities by classical music interest of parents (%)



Q6. Thinking about your training and education in music, which of the following opportunities did you undertake?
 Base: All respondents with parents interested in classical music (696); all respondents with parents not interested in classical music (267)

7 PERCEPTIONS OF THE CLASSICAL MUSIC SECTOR

This section looks at how respondents to the survey perceive the classical music sector. Specifically, it explores what survey respondents said were the most important factors to them when it comes to considering work in the sector. The chapter also looks at any differences between groups of respondents (for example, LGBTQ+ respondents, Black, Asian and other ethnically diverse respondents) when it comes to the importance they place on different factors. It also does a deeper dive into how open people are in terms of sexual orientation, gender identity, and disability in their workplace.

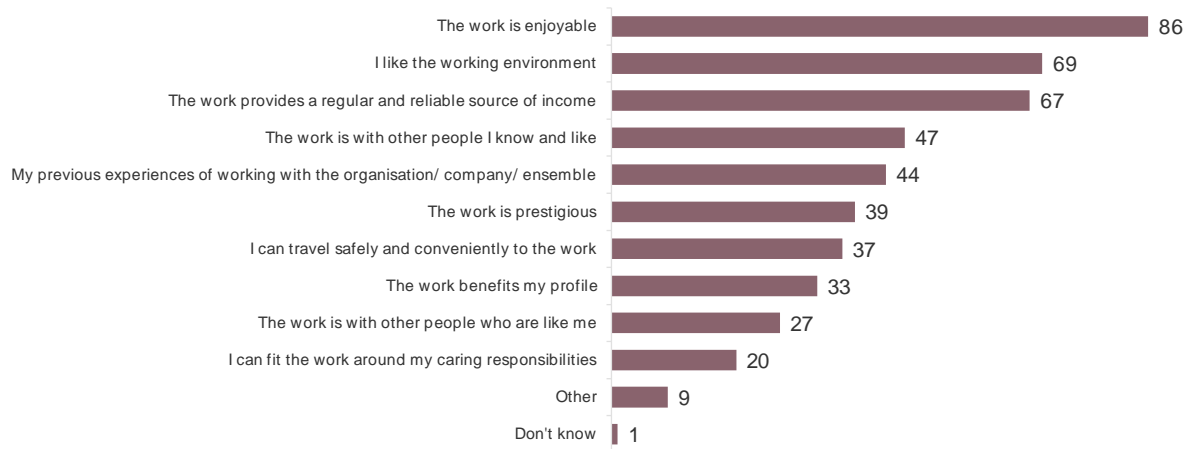
The section finds that the most important factors when it comes to considering work in the sector were related to enjoyment and income, while less importance was placed on practical factors relating to travelling to work and caring responsibilities. Across the different groups surveyed, LGBTQ+ respondents were more likely than heterosexual respondents to say that factors relating to the working environment and the people who they work with are very important to them. Most LGBTQ+ respondents said that they are open about their sexual orientation with at least some people at their organisation, but they were less likely than heterosexual respondents to say that they are open with everyone.

With regard to the most important factors when it comes to considering work in the sector, there were very few statistically significant differences between white and Black, Asian and other ethnically diverse respondents and between disabled and non-disabled respondents. A majority of disabled respondents said that they are open with at least some people in their organisation about their disability, although only around a third said that they were open with everyone.

The overall picture

The most important factors when it comes to considering work in the sector were centred around **enjoyment** and **income**. When presented with a list from which they could select multiple options, nearly nine in ten survey respondents said that one of the most important factors when considering work in the sector is that **the work is enjoyable** (86%), making it the most commonly selected factor. Similarly, a high proportion of respondents – seven in ten – said that **liking the work environment** is one of the most important factors to them (69%). With regards to income, just under seven in ten said that **providing a regular and reliable source of income** is one of the most important considerations (67%), making it the third most commonly selected factor.

Figure 7.1: Most important factors when considering work in the sector (%)



Q7. Which of these factors are most important to you when you are considering work in the sector? Base: All respondents (967)

Despite being of less importance than factors relating to enjoyment and income, many respondents viewed their **previous experiences** and **prospective colleagues** as among the most important factors to consider before taking on work in the sector. Nearly half of respondents said that **their previous experience of working with the organisation, company, or ensemble** is among the most important factors in their mind when considering work (44%), while a similar proportion said that **working with other people I know and like** is one of the most important considerations (47%). Even though respondents placed importance on working with people they know and like, they were less concerned that the people they work with are like them. Indeed, less than three in ten said that one of the most important factors to them is that **the work is with other people who are like me** (27%), making it one of the least selected answer options.

Between three in ten and four in ten survey respondents said that factors relating to **profile** and **prestige** were among the most important to them when considering work in the sector. A third of respondents said that **the work benefitting their profile** is one of the most important considerations (33%) and four in ten said the same about **the work being prestigious** (39%).

Respondents to the survey placed less importance on more practical factors such as **travelling to work** and their own **caring responsibilities**. Fewer than four in ten respondents said that being able to **travel safely and conveniently to the work** (37%) is among the most important factors for them. An even smaller proportion – two in ten – said that being able **to fit the work around their caring responsibilities** is among the most important factors to them when considering work in the sector (20%), making it the least commonly selected of all the given answer options.

The survey also asked respondents about their openness about their gender identity and/or sexual orientation at their workplace, as well as asking disabled respondents about whether they are open about their disability at their place of work. Overall, over eight in ten respondents to the survey said that they are **open with everyone** about their gender identity and/or sexual orientation at their workplace (84%), while one in ten said that they are **open with some people** (11%) and two per cent said that they are **open with no one**. With regard to disability, a third of disabled respondents said that they are **open with everyone** about their disability at their place of work (33%). A plurality said that they are **open with some people** (45%), while just over one in ten said that they are **open with no one** (12%).

Perceptions among different groups

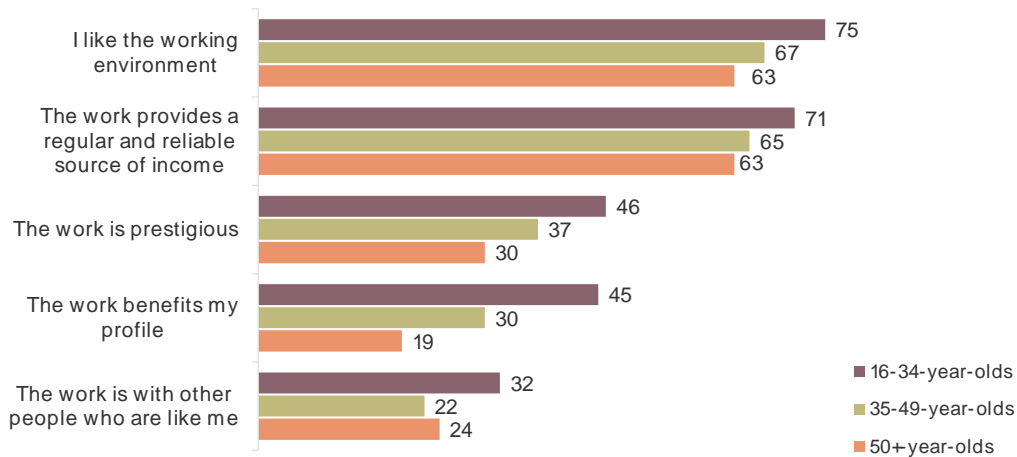
When it comes to the most important factors in terms of considering work in the sector, there were no statistically significant differences between the responses of male and female respondents to the survey. A greater proportion of men than women did say that the factors of **income** (70% vs. 65%), **working with people I know and like** (51% vs. 45%), and **prestige** (42% vs. 37%) were among the most important to them, but none of these differences were large enough to be statistically significant.

Women who responded to the survey were no more likely than men to say that being able to **fit the work around their caring responsibilities** is one of the most important factors when considering work in the sector, with around one in five male and female respondents selecting this (18% and 22%, respectively).

However, there are some differences across the different age groups. For instance, those respondents aged 35-49 were more likely than those aged 16-34 to say that being able to **fit the work around caring responsibilities** is one of the most important factors when considering work in the sector. More than three in ten 35-49-year-olds said that this factor was among the most important to them (35%), compared to just over one in ten 16-34-year-olds (12%).

For other factors, there were also significant differences across the age groups. Younger respondents were more likely than older respondents to place high importance on factors relating to **enjoyment**, **income**, **prestige** and **profile**, and **working with people who are similar to them**:

Figure 7.2: Most important factors when considering work in the sector by age (%)



Q7. Which of these factors are most important to you when you are considering work in the sector? Base: 16-34-year-olds (416); 35-49-year-olds (279); 50+-year-olds (263)

Those respondents who identify as LGBTQ+ were more likely than heterosexual respondents to say that factors relating to the **working environment** and **the people who they work with** are among the most important for them when it comes to considering work in the sector. Eight in ten LGBTQ+ respondents said that **liking the working environment** was one of the most important factors to them (80%), compared to fewer than seven in ten of those who identify as heterosexual (67%). A greater proportion of LGBTQ+ respondents than heterosexual respondents also said that one of the most important factors is that **the work is with other people I know and like** (54% vs. 46%) and, similarly, that **the work is with other people who are like me** (34% vs. 26%). Among LGBTQ+ respondents, there was also an increased emphasis on the importance of being able to **travel safely and conveniently to the work**, with over four in ten saying that this was one of the most important factors for them (43% vs. 35% for heterosexual respondents).

Specific experiences of LGBTQ+ respondents

Digging down a bit deeper into the perceptions of LGBTQ+ respondents about the classical music sector, most LGBTQ+ respondents said that they are **open about their gender identity and/or sexual orientation at their organisation**. Around six in ten LGBTQ+ survey respondents said that they are **open with everyone** (61%), while a further third said that they are **open with some people** at their organisation (34%). Around one in twenty LGBTQ+ respondents said that they are **open with no one** (four per cent). Heterosexual or straight respondents were more likely than LGBTQ+ respondents to say that they are **open with everyone** (92%) and less likely to say that they are **open with some people** (five per cent) or **no one** (two per cent).

Across the entire sample, the proportion of respondents who said that they are **open with everyone** about their gender identity and/or sexual orientation was over eight in ten (84%), with one in ten being **open with some people** (11%), and two per cent being **open with no one**.

Figure 7.3: Openness about gender identity and/or sexual orientation at place of work (%)



Q10. Are you open about your gender identity and/ or sexual orientation at your organisation? Base: All respondents (967), Heterosexual or straight (743), LGBTQ+(186)

The data also suggests that there are differences in openness among the groups within the LGBTQ+ umbrella, and that therefore the experience of all LGBTQ+ groups is not the same. Specifically, the levels of openness among those who identify as gay or lesbian were much closer to the levels among heterosexual respondents. More than eight in ten gay or lesbian respondents said that they are **open with everyone** at their organisation (83% vs. 92% among those who are heterosexual or straight). This indicates that respondents who identify as LGBTQ+, but are not gay or lesbian, were less open about their gender identity and/or sexual orientation. The responses of these respondents were therefore the main drivers behind the large difference between the proportion of LGBTQ+ respondents who said that they are **open with everyone** and the proportion of heterosexual respondents who said the same.

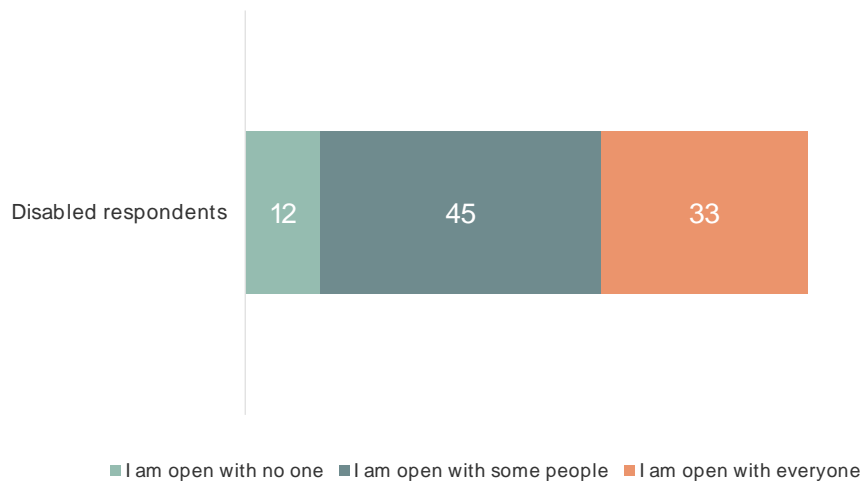
Examining the importance of different factors when considering work in the classical music sector, there were very few statistically significant differences between the responses of white respondents and Black, Asian and other ethnically diverse respondents or between disabled respondents and non-disabled respondents. White respondents and non-disabled respondents were more likely than Black, Asian and other ethnically diverse respondents and disabled respondents, respectively, to say that one of the most important factors to them when considering work in the sector is that **the work provides a regular and reliable source of income**. Just under seven in ten white respondents and non-disabled respondents selected this factor as among the most important (68% and 69%, respectively). This compares to fewer than six in ten Black, Asian and other ethnically diverse respondents (57%) and disabled respondents (also 57%).

Please note the relatively low base sizes of these groups and take this into consideration when interpreting this analysis.

Specific experiences of disabled respondents

Looking at the perceptions of the sector among disabled respondents more specifically, the majority of disabled people said that they are **open about their disability with at least some people at their organisation**. Half said that they are **open with everyone** about their disability (49%), while over a third said that they are **open with some people** (36%). Just over one in ten disabled people who responded to the survey said that that are **open with no one** at their organisation (12%).

Figure 7.4: Openness about disability at place of work (%)



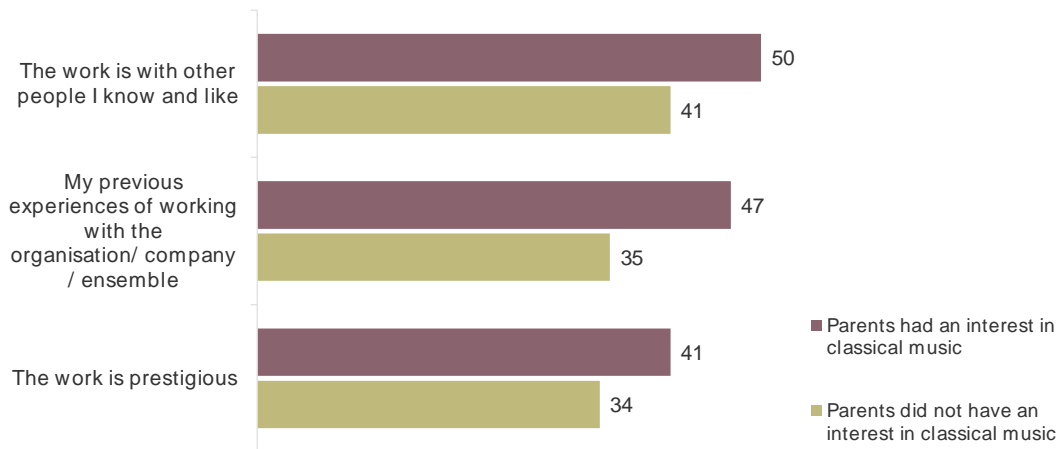
Q10. Are you open about your disability at your organisation? Base: All disabled respondents (92)

Returning to the importance of different factors when considering work in the sector, those respondents who were in higher social grades when they were aged 14 were more likely than those in lower social grades to say that the **prestige** of the work is an important factor to them. Four in ten of those in the social grades ABC1 said that **the work being prestigious** is one of the most important factors when considering work in the sector (41%), compared to three in ten of those in the social grades C2DE (29%). Moreover, over a third of those who were in the ABC1 social grades when they were growing up said that **the work benefitting their profile** is an important factor to them when considering work in the sector (35%), compared to around a quarter of those in the C2DE grade (26%).

Similarly, respondents to the survey whose parents had an interest in classical music when they were growing up were more likely than those respondents whose parents had no such interest to say that the **prestige** of the work is an important factor. Four in ten of those with parents who had an interest in classical music said that one of the most important factors to them when considering work in the sector is that **the work is prestigious** (41%), compared to around a third of those whose parents were not interested in classical music (34%).

Moreover, a greater proportion of those respondents with parents engaged in classical music than those whose parents were not engaged said that factors relating to their **previous experiences** and **the people they work with** are among the most important.

Figure 7.5: Most important factors when considering work in the sector by parents' interest in classical music (%)



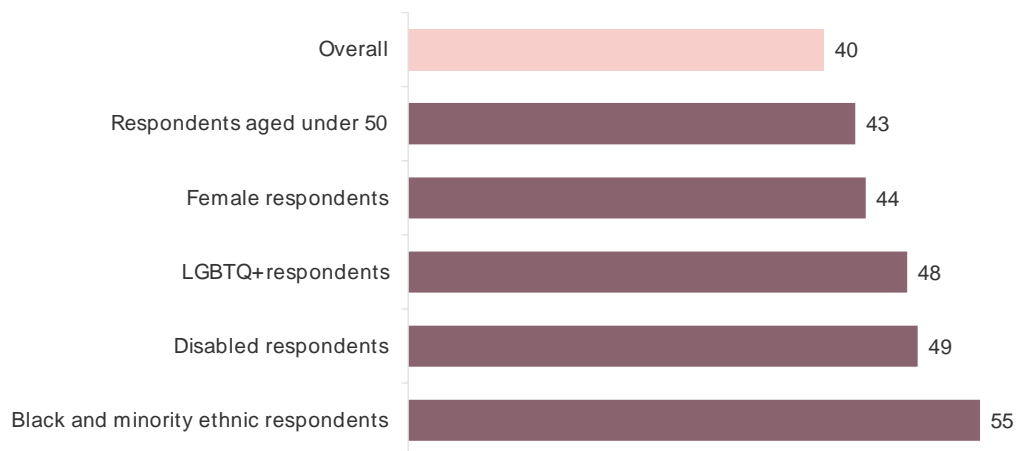
Q7. Which of these factors are most important to you when you are considering work in the sector? Base: Those whose parents had an interest in classical music (696); Those whose parents did not have an interest in classical music (267)

8 BARRIERS AND CHALLENGES

This section looks at the barriers and challenges that survey respondents have perceived. The chapter explores what proportion of survey respondents agreed that they come up against or have come up against barriers that restrict the opportunities available to them in their career. It then looks at the nature of these barriers. Throughout, the chapter draws out any differences in the experiences of different groups (for example, female respondents, disabled respondents, Black, Asian and other ethnically diverse respondents) and takes a deeper look into the specific challenges faced by disabled respondents.

The chapter finds that more survey respondents agreed than disagreed that they face or have faced barriers that restrict the opportunities available to them. It also finds that, looking at the survey sample as a whole, the most commonly mentioned barriers relate to **gender discrimination** and **financial constraints**. Looking beyond the overall level, the chapter finds that the proportion who felt that there are or have been barriers is higher among female respondents, respondents aged under 50, LGBTQ+ respondents, disabled respondents, and, particularly, Black, Asian and other ethnically diverse respondents. Indeed, more than half of Black, Asian and other ethnically diverse respondents agreed that they face or have faced barriers restricting their opportunities.

Figure 8.1: Proportion who agree that they face or have faced barriers across different groups (%)



Q8. Thinking about your career so far and your aspirations for the future, do you feel that there are or have been barriers that restrict the opportunities available to you? Base: All respondents (967); Female respondents (521); Respondents aged under 50 (695); LGBTQ+ respondents (186); Disabled respondents (92); Black and minority ethnic respondents (93)

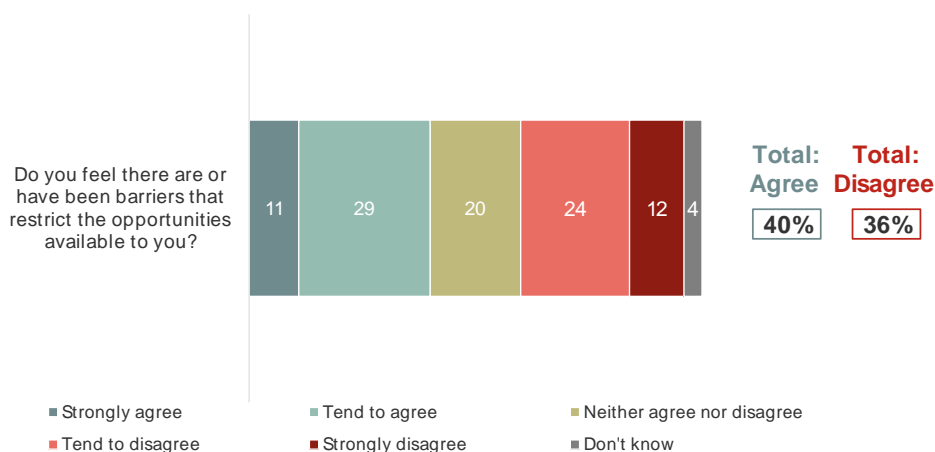
While **race** was the most commonly mentioned barrier among Black, Asian and other ethnically diverse respondents, **sexuality** was **not** the most common barrier reported by respondents

identifying as LGBTQ+. Instead, barriers relating to gender, money, social class, age, and race were all cited more often than sexuality by LGBTQ+ respondents.

The overall picture

Among people who responded to the survey, more think that there are or have been barriers that restrict the opportunities available to them than think that there have not been such barriers. Indeed, when asked to think about their career so far and their aspirations for the future, four in ten respondents agreed that there are or have been barriers that restrict the opportunities available to them (40%), slightly more than the 36% who disagreed.

Figure 8.2: Presence of barriers restricting opportunities (%)



Q8. Thinking about your career so far and your aspirations for the future, do you feel that there are or have been barriers that restrict the opportunities available to you? Base: All respondents (967)

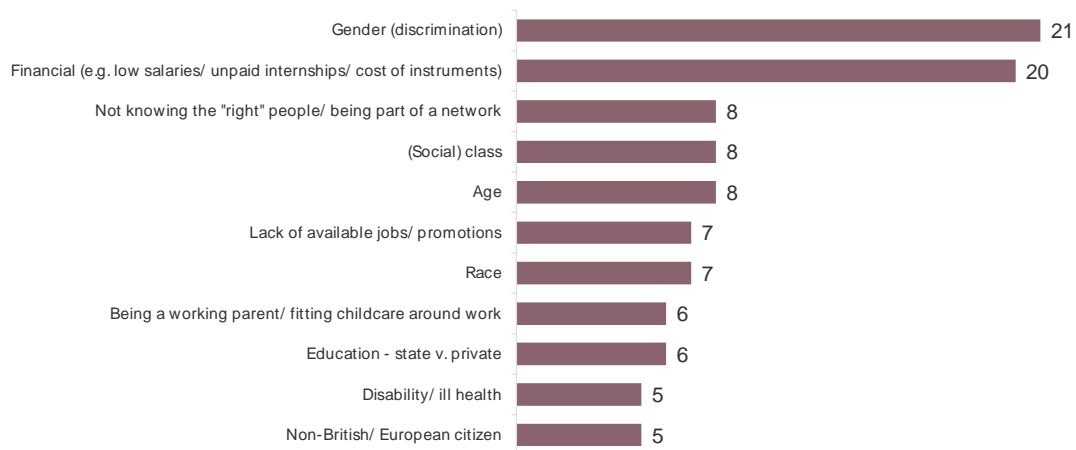
Among those who agreed that there are or have been barriers that restrict the opportunities available to them, the most commonly perceived obstacles relate to **gender** and **money**. When asked to give an open-ended response to describe the barriers they face or have faced, one in five mentioned **discrimination based on their gender** (21%), while the same proportion cited **financial barriers** (20%) – for example, low salaries, unpaid internships, and the cost of instruments. These were by far the most commonly mentioned barriers among all respondents, with no other types of barriers being mentioned by more than one in ten respondents.

Research carried out by the Musicians Union in 2017 amongst 285 musicians found that 44% of young musicians said they did not earn enough from orchestral work alone to live on. This is compounded by the fact that a similar proportion (43%) of those with 0-5 years in the industry had taken on unpaid work in the last 12 months, compared with 17% of those with 11-20 years' experience. Information provided by the Musicians Union highlights the challenges musicians

face with instrument choice: a violin or double bass can cost between £15,000 and £200,000; an oboe or cor anglais costs £8,000; and trumpets £3,000 apiece. These costs do not take into account associated accessories, maintenance or repairs or insurance.

The next most common barriers, mentioned by just under one in ten respondents to the survey, related to **not knowing the “right” people or not being part of a network** (8%), **social class** (8%), **age** (8%), **lack of available jobs or promotions** (7%), and **race** (7%). Beyond these obstacles, around one in five said that the barriers they faced related to **being a working parent or fitting childcare around work** (6%), **education (state vs. private)** (6%), and **disability or ill health** (5%).

Figure 8.3: Types of barrier perceived¹⁵ (%)



Q7. Please describe the barriers that you feel restrict or have restricted the opportunities available to you. Base: All who agree that there are obstacles (385)

Barriers and challenges among different groups

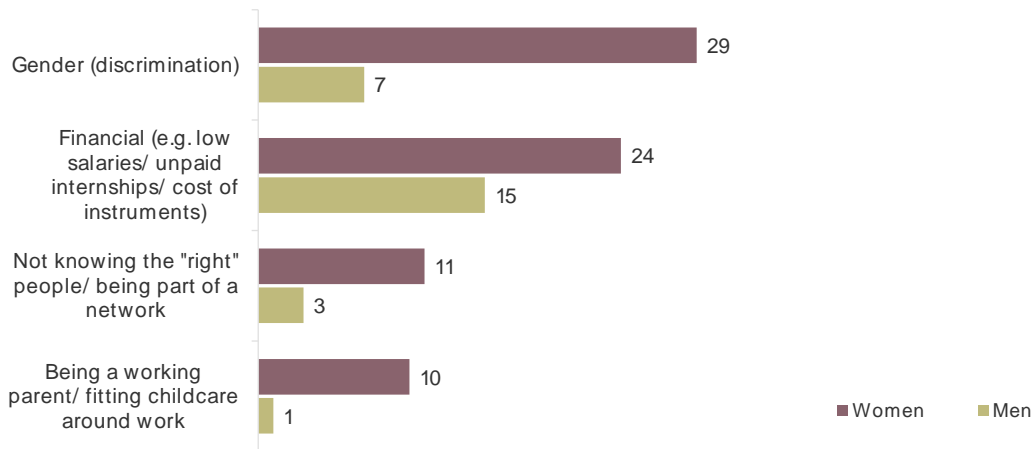
When it comes to perceived barriers that restrict or have restricted opportunities, a greater proportion of female respondents than male respondents agreed that there have been such barriers. Over four in ten women who responded to the survey agreed that they face or have faced barriers (44%), compared to around a third of men who said the same (34%). Moreover, when asked to describe these barriers, female respondents were much more likely than male respondents to mention barriers relating to **gender, finance, networks, and parenting**. For instance, three in ten women who feel that they face or have faced barriers cited **discrimination based on their gender** (29%), compared to fewer than one in ten men (7%). Similarly, around a quarter of women who perceived barriers said that **financial barriers** were among these (24%),

¹⁵ Types of barrier mentioned by fewer than one in twenty respondents are not shown in the chart.

as against 15% of men. There are also disparities between female and male respondents with regard to the barriers of **not knowing the “right” people or not being part of a network** (11% vs. 3%) and **being a working parent or fitting childcare around work** (10% vs. 1%).

Non-players are more likely to agree that there are or have been barriers that restrict the opportunities available to them. 44% of non-players agreed that these barriers exist compared with 36% of players.

Figure 8.4: Types of barrier perceived by gender (%)



Q7. Please describe the barriers that you feel restrict or have restricted the opportunities available to you. Base: All female respondents who agree that there are obstacles (228); All male respondents who agree that there are obstacles (144)

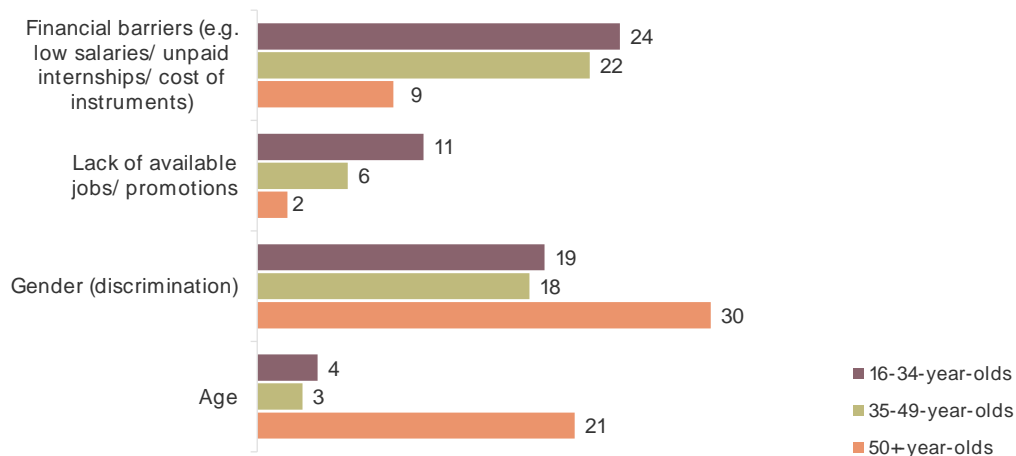
Survey respondents aged under 50 were more likely than those aged 50 or over to agree that there are or have been barriers in their career. More than four in ten 16-34-year-olds felt that there are or have been barriers that restrict the opportunities available to them (44%), as did more than four in ten 35-49-year-olds (43%). Those aged 50 or over were much less likely to agree that there are or have been barriers, with only around three in ten agreeing (31%).

Among those who have perceived barriers, a greater proportion of younger respondents than older respondents mentioned **financial barriers** and the **lack of available jobs or promotions**. Over one in five of those aged 16-34 (24%) and 35-49 (22%) said that the barriers that they feel restrict or have restricted them are **financial – for instance, low salaries, unpaid internships, or the cost of instruments**. Only one in ten respondents aged 50+ perceived this kind of barrier (9%). As for a **lack of available jobs or promotions**, one in ten 16-34-year-olds mentioned this as a barrier they had felt (11%), compared to one in twenty 35-49-year-olds (six per cent) and two per cent of those aged 50 or over. It is worth noting that these questions asked respondents about barriers that they have perceived over the course of their career, and not just about current barriers.

Meanwhile, again among those respondents who agreed that there are or have been barriers that have restricted the opportunities available to them, older respondents were more likely than

younger respondents to say that these barriers were related to **gender** and **age**. Three in ten respondents aged 50 or over said that **gender** was one of the barriers that they feel restrict or have restricted the opportunities open to them (30%). This compares to two in ten of those aged 16-34 (19%) and 35-49 (18%). Similarly, older respondents were much more likely than younger respondents to perceive **age** as being one of the barriers that has restricted them, with one in five of those aged 50+ citing this (21%), compared to fewer than one in twenty 16-34-year-olds (four per cent) and 35-49-year-olds (three per cent).

Figure 8.5: Types of barrier perceived by age (%)



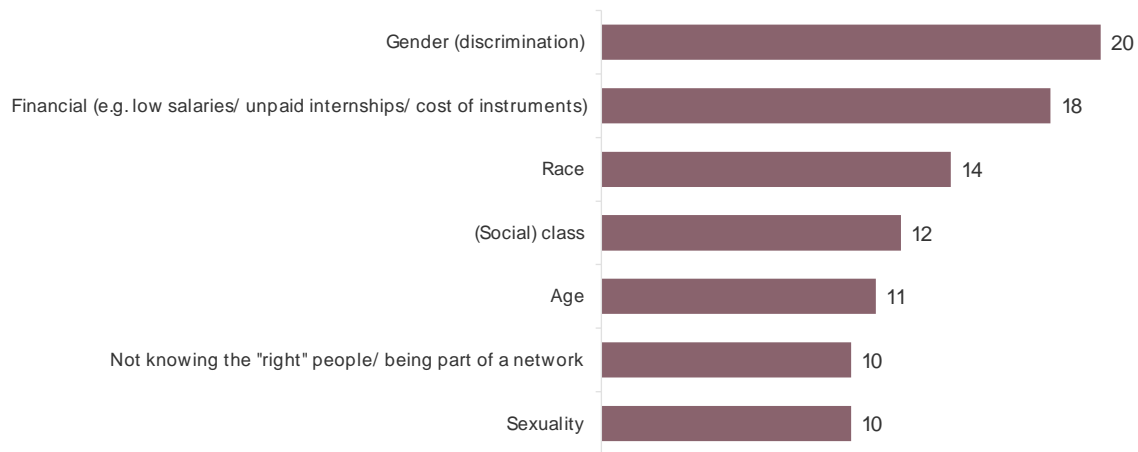
Q7. Please describe the barriers that you feel restrict or have restricted the opportunities available to you. Base: 16-34-year-olds who agree that there are obstacles (180); 35-49-year-olds who agree that there are obstacles (119); 50+ year-olds who agree that there are obstacles (82)

Those respondents who identify as LGBTQ+ were more likely than heterosexual respondents to agree that, when it comes to thinking about their career so far and their aspirations, there are or have been barriers that restrict the opportunities available to them. Just under half of LGBTQ+ respondents agree that they perceive or have perceived such barriers (48%), compared to fewer than four in ten of those respondents who identify as heterosexual (38%).

However, the data indicates that the experiences of different groups within the LGBTQ+ umbrella are not the same. The proportion of gay or lesbian respondents who agreed that there are or have been barriers in their career is almost identical to the figure among heterosexual respondents (39% and 38%, respectively). This indicates that the difference between the proportion of LGBTQ+ respondents who agreed that there are or have been barriers and the proportion of heterosexual or straight respondents who agreed is driven by the responses of those who identify as LGBTQ+ but are not gay or lesbian.

Among those who agreed that there are or have been barriers that have restricted them, one in ten LGBTQ+ respondents said that the barriers related to their **sexuality** (10%). However, this was not the most commonly mentioned barrier among LGBTQ+ respondents. **Gender, financial barriers, social class, age, and race** were all cited more frequently than sexuality.

Figure 8.6: Most commonly mentioned barriers among LGBTQ+ respondents (%)

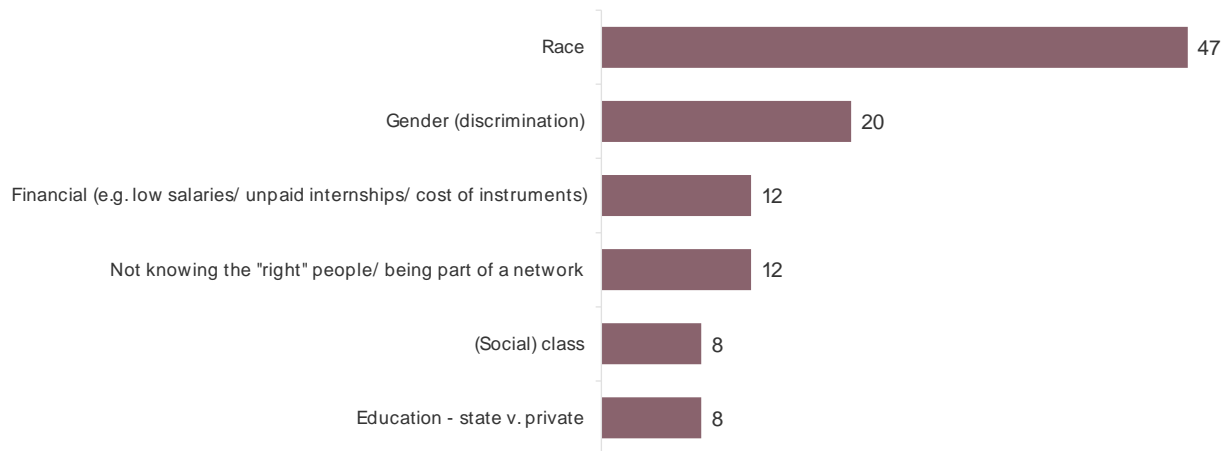


Q7. Please describe the barriers that you feel restrict or have restricted the opportunities available to you. Base: All LGBTQ+ respondents who agree that there are obstacles (90)

With regards to ethnicity, Black, Asian and other ethnically diverse respondents were much more likely than white respondents to feel that there are or have been barriers that restrict the career opportunities available to them. Over half of Black, Asian and other ethnically diverse respondents agreed that there are or have been such barriers (55%), compared to just under four in ten white respondents (38%). Moreover, Black, Asian and other ethnically diverse respondents were nearly three times as likely as white respondents to **strongly** agree that there are or have been barriers (29% vs. 10%).

Nearly half of the Black, Asian and other ethnically diverse respondents who perceive or have perceived barriers said that these barriers relate to their **race** (47%), making it by far the most commonly mentioned barrier among this group.

Figure 8.7: Most commonly mentioned barriers among Black and minority ethnic respondents (%)



Q7. Please describe the barriers that you feel restrict or have restricted the opportunities available to you. Base: All Black and minority ethnic respondents who agree that there are obstacles (51)

As for disabled respondents, the data suggests that this group was more likely than non-disabled respondents to agree that there are or have been barriers that restrict the opportunities available to them. While the difference is not statistically significant in this instance, half of disabled respondents agreed that there are or have been barriers (49%), compared to four in ten non-disabled respondents (39%). Disabled respondents were also twice as likely as non-disabled respondents to **strongly** agree that there are or have been barriers (20% vs. 10%), and this time the difference is statistically significant.

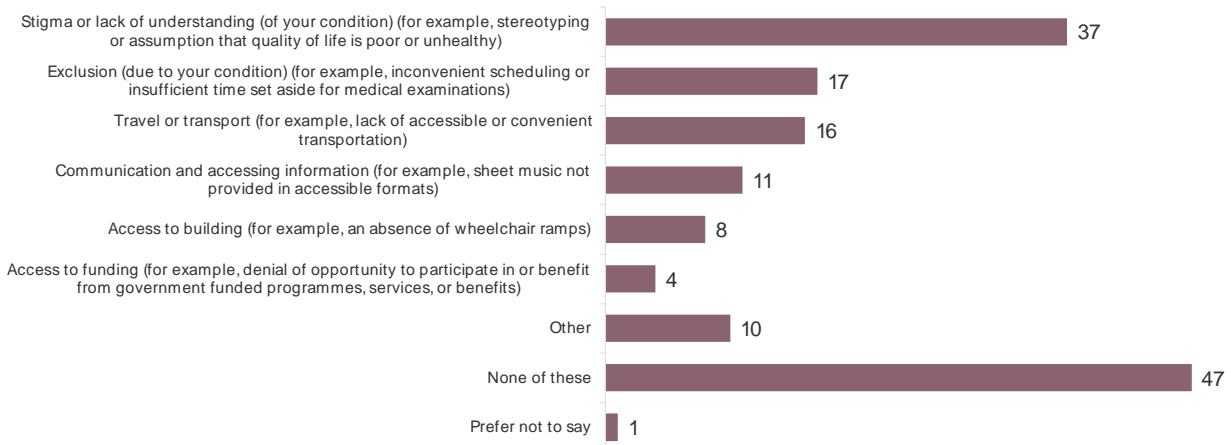
Three in ten of those disabled respondents who agreed that there are or have been barriers said that these barriers relate to their **disability or ill health** (29%), meaning that this is the most commonly cited barrier among this group.

Specific experiences of disabled respondents

Delving more deeply into the experiences of the disabled respondents, the survey asked about what specific challenges they have faced as a result of their condition. By far the most commonly mentioned challenge among disabled respondents is **stigma or lack of understanding of their condition** (for instance, stereotyping or the assumption that quality of life is poor or unhealthy). Just under four in ten disabled respondents said that they had experienced challenges with this (37%). Just under one in five said that they had experience challenges with **exclusion due to their condition** (for example, inconvenient scheduling or insufficient time set aside for medical examinations) (17%) and with **travel or transport** (for example, lack of accessible or convenient transportation) (16%). The only other aspect that more than one in ten disabled respondents said that they had experienced challenges with was **communication and accessing information** (for instance, sheet music not provided in accessible formats) (11%). Overall, just over half of all disabled respondents said that they have experienced challenges as a result of their condition (52%), while just under half said they have not (47%).

Please note the relatively low base sizes of these groups and take this into consideration when interpreting this analysis.

Figure 8.8: Challenges faced by disabled respondents (%)



D6c. Have you experienced any challenges with any of the following as a result of your condition? Base: All disabled respondents (92)

While there were no statistically significant differences between respondents who were in social grade ABC1 when they were 14 and those who were in social grade C2DE, there are differences between those with parents interested in classical music and those whose parents had no such interest. Those with parents who had an interest in classical music were more likely than those with parents who did not have an interest to **disagree** that there are or have been barriers restricting the opportunities available to them (39% vs. 30%). Similarly, those with parents who did not have an interest in classical music were more likely than those with parents who did have an interest to agree **strongly** that there are or have been barriers (15% vs. 10%).

Among those who perceived barriers restricting their opportunities, those with parents who had no interest in classical music were more likely than respondents with parents interested in classical music to say that the barriers they face or have faced relate to **social class** (13% vs. 6%), coming from a **non-musical family** (5% vs. 2%), and **nepotism** (5% vs. 1%).

9 APPENDIX

Steering and Reference Groups

We would like to thank the Steering and Reference Group for their advice and support throughout this project, providing guidance in the design of the survey questionnaire, promoting the survey through their channels and reviewing the final report.

Steering Group

Alan Davey (BBC)

Chi-chi Nwanoku (Chineke!)

David Ruebain (Conservatoires UK/Conservatoire of Dance and Drama)

Dougie Scarfe (Bournemouth Symphony Orchestra)

Gerry Godley (Conservatoires UK/Leeds College of Music)

Janet Tuppen (BBC)

Jo Laverty (Musicians Union)

John Shortell (Musicians Union)

Jonathan Harper (Paraorchestra)

Mark Pemberton (Association of British Orchestras)

Reference Group

Association British Orchestras

Attitude is Everything

Drake Music

Hackney Music Service

Harrison Parrot

Help Musicians

ISM

London Music Masters

London Philharmonic Orchestra

Making Music

Manchester Collective

Music for Youth

Music Mark

National Children's Orchestra

Nottingham Music Hub

NYO

Open Up Music

Orchestras For All

Orchestras Live

RLPO

Royal Philharmonic Society

Sage Gateshead

Snape Maltings

Sound Connections

Southbank Sinfonia

Trinity Laban

Youth Music

Questionnaire

Introduction

Thank you for agreeing to take part in this survey which is being carried out by ICM Unlimited on behalf of Arts Council England.

Why we're conducting this survey

Working in collaboration with the classical music sector – including the Association of British Orchestras, Musicians Union, Conservatoires UK and the BBC – our aim is to transform our collective understanding of the current make-up of the classical music workforce in England, with the specific aim of enhancing our insight into its diversity.

Alongside this survey we are exploring all the evidence we can find about which interventions, if any, have enabled genuine, long-term change in the global classical music sector to date. We want to use this evidence to form the basis of conversation and a joint set of actions for the next ten years. If you'd like to find out more, please visit <https://www.artscouncil.org.uk/blog/diversity-classical-music>

Although Arts Council England already asks for information about the workforce in the organisations which form part of its National Portfolio, we know that they represent only a small proportion of all the people who work in the sector. And it's clear that not everyone who

responds to their employer is fully comfortable about disclosing their personal characteristics, whether or not they directly relate to their life as a musician. **So your response matters!**

Your answers to this survey will help us to accurately understand the levels of diversity within the workforce and to expose what is hidden, as well as what is more visible or understood. **And we'd love you to share information about this survey with other people in the classical music workforce so that we hear from as many people as possible.**

Arts Council England continues to fund a range of other work which supports the diversity of classical and operatic talent and anticipates that further research into these other aspects of the broader classical music sector will be necessary follow-up steps to this initial large-scale research project.

Who can take part? [PAGE 2]

To help us in this work, we need a broad range of those associated with classical music to complete the survey, **including performing musicians, teachers and administrative and other support staff including learning and participation professionals**. We are keen to hear the voices of those who work on a **freelance basis** in addition to those on **permanent contracts**, and it's as important that we hear from those whose instrumental background is in classical music, but who work in or with chamber groups, pit bands, and popular music ensembles of all kinds as it is that we hear from those who work in formal orchestral settings. Whether you have just begun your career or have been involved in the classical orchestral world for several decades, your viewpoint and experiences are highly valued.

Please note that at this point in time, **we are not seeking responses from composers, singers or pianists to the survey**. We recognise the substantial impact these musicians have on the overall diversity of classical music but have chosen to focus on developing a true picture of diversity within the sector – and those points in its workforce pipeline where diversity becomes diminished – because of the scale and impact of this body of musicians on the overall output of the sector.

The survey is open to those **aged 16 years and over** who are currently working within the sector. It will take no longer than 10 minutes to complete. Please note that Classical Music students (i.e. those not currently undertaking paid employment of any kind within the classical music sector) are also asked not to complete the survey: student data will be incorporated into our wider study from other sources.

Privacy disclaimer [PAGE 3]

All responses will remain entirely confidential. The answers you provide will never be linked to you personally and will be analysed at an aggregate level. Your answers will be used for the purposes of this research only.

ICM Unlimited, part of Walnut Unlimited, follows the Market Research Society's code of conduct. All data is treated as private and confidential. You may withdraw your participation at any time.

For more privacy information, please visit <https://www.walnutunlimited.com/privacy-cookie-policy/>

Some of the data we collect is termed as sensitive and we will ask questions relating to age, disability, gender reassignment, race, sex and sexual orientation. We would greatly appreciate you disclosing this information so that we can better analyse the experiences of people from a range of different backgrounds within the classical music sector.

By participating in this research, you agree to provide this information unless you select prefer not to say. Please be reassured that your responses will remain confidential.

If you have any questions about the survey, please contact [ICM EMAIL ADDRESS].

Please click on the survey start button if you are happy to continue.

SECTION A: DEMOGRAPHICS

Thank you for agreeing to take part in the survey. This first section will focus on you, so that we can build a picture of the current make up of classical music sector in England. Please note that your answers will not be identified at the individual level and will remain confidential.

ASK ALL

D1. Which of the following describes how you think of your gender identity? SINGLE CODE.

1. Female
2. Male
3. Non-Binary
4. Prefer not to say

ASK ALL

D2. Is your gender identity the same as the sex you were assigned at birth? SINGLECODE

1. No
2. Yes
3. Prefer not to say

ASK ALL

D3. Please could you tell us your age? SINGLECODE.

1. 0-15 [CLOSE]
2. 16-19
3. 20-34 years old
4. 35-49 years old
5. 50-64 years old
6. 65-74
7. 75+
8. Prefer not to say

ASK ALL

D4. Which of these best describes your ethnic group?

SINGLE CODE

White

1. English / Welsh / Scottish / Northern Irish / British
 2. Irish
 3. Gypsy or Irish Traveller
 4. Any other White background
- Mixed / Multiple ethnic groups
5. White and Black Caribbean
 6. White and Black African
 7. White and Asian
 8. Any other Mixed / Multiple ethnic background
- Asian / Asian British
9. Indian
 10. Pakistani
 11. Bangladeshi
 12. Chinese
 13. Any other Asian background
- Black / African / Caribbean / Black British
14. African
 15. Caribbean
 16. Any other Black / African / Caribbean background
- Other ethnic groups
17. Arab
 18. Any other ethnic group
 19. Prefer not to say

ASK ALL

D5. Which of the following options best describes how you think of yourself?

SINGLECODE

1. Bisexual
2. Gay Man
3. Gay Woman / lesbian
4. Heterosexual / straight
5. Queer
6. Other (please specify)
7. Prefer not to say

ASK ALL

D6a. Do you identify as a deaf or disabled person, or have a long-term health condition?

SINGLE CODE

1. Yes

2. No
3. Prefer not to say

ASK ALL WITH A DISABILITY (D6a=1)

D6b. You said you identify as deaf, disabled or as having a long-term health condition. Does this affect you in any of the following areas?

We would like to remind you that your answer will remain entirely anonymous and will not be shared beyond this survey.

MULTICODE, RANDOMISE LIST APART FROM 10, 11 & 12– FIX AT END.

1. Vision (for example blindness or partial sight)
2. Hearing (for example deafness or partial hearing)
3. Mobility- lower body or back(for example walking short distances or climbing stairs)
4. Mobility – upper body, arms or hands (for example using a keyboard or playing an instrument)
5. Learning or understanding or concentrating
6. Memory
7. Mental health
8. Stamina or breathing or fatigue
9. Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger’s syndrome)
10. Other (please specify)
11. None of these SINGLECODE
12. Prefer not to say SINGLECODE

ASK ALL WITH A DISABILITY (D6a=1)

D6c. Have you experienced any challenges with any of the following as a result of your condition? Please focus on your experiences within the music sector

We would like to remind you that your answer will remain entirely anonymous and will not be shared beyond this survey.

MULTICODE, RANDOMISE LIST APART FROM 7, 8 & 9– FIX AT END.

1. Access to buildings (for example, an absence of wheelchair ramps)
2. Communication and accessing information (for example, sheet music not provided in accessible formats)
3. Travel or transport (for example, lack of accessible or convenient transportation)
4. Access to funding (for example, denial of opportunity to participate in or benefit from government funded programmes, services or benefits)
5. Exclusion (due to your condition) (for example inconvenient scheduling or insufficient time set aside for medical examinations)

6. Stigma or lack of understanding (of your condition) (for example, stereotyping or assumption that quality of life is poor or unhealthy)
7. Other (please specify)
8. None of these SINGLECODE
9. Prefer not to say SINGLECODE

SECTION B: SECTOR PROFILE

This next section will focus on your role(s) in the music sector.

ASK ALL

1. Which of these best describes your current work within music sector whether as a performer, administrator or in another capacity? Please select all that apply.
MULTICODE RANDOMISE

1. I work in formal/informal music education (e.g. a school, community setting or other educational environment)
2. I work in or with a small ensemble / band (i.e. classical chamber music)
3. I work in or with a small ensemble / band (in any other genre of music)
4. I work for an opera and/or ballet company
5. I work in a choral setting
6. I work in a healthcare and/or justice environment
7. I work with an orchestra and/or other large instrumental music ensemble
8. I work as a session musician
9. I work as a soloist and/or featured artist
10. I work as a conductor and/or music director (e.g. of a pit band in the west end)
11. I work in or with a conservatoire and/or as a music educator in further or higher education
12. I work in musical theatre and/or another theatrical setting
13. I work in an amateur/voluntary/leisure time music ensemble as a paid professional
14. Other (please specify)
15. None of these [CLOSE]

ASK ALL

2. Does your current role in the classical music sector primarily involve playing and performing with an instrument? SINGLECODE

Yes (please specify your primary instrument)

1. Alto clarinet
2. Alto trombone
3. B flat slide trombone
4. B flat trombone
5. Baritone horn
6. Baroque bassoon
7. Baroque cello
8. Baroque flute
9. Baroque horn

10. Baroque oboe
11. Baroque recorder
12. Baroque viola
13. Baroque violin
14. Bass clarinet
15. Bass flute
16. Bass trombone
17. Bass viol
18. Bassoon
19. Brass
20. Cello
21. Clarinet
22. Classical guitar
23. Conductor
24. Contra bassoon
25. Cor anglais
26. Cornet
27. Double b flat bass
28. Double bass
29. E flat bass
30. E flat clarinet
31. Early wind
32. Euphonium
33. Flugel horn
34. Flute
35. French horn
36. Hand percussion
37. Harp
38. Horn
39. Music director
40. Natural horn
41. Oboe
42. Percussion
43. Piccolo
44. Renaissance strings
45. Renaissance wind
46. Soprano cornet
47. Strings
48. Tenor horn
49. Tenor trombone
50. Timpani
51. Trombone
52. Trumpet
53. Tuba
54. Tuned percussion
55. Valve trombone
56. Vibraphone
57. Viola
58. Viola da gamba
59. Violin

- 60. Wagner tuba
- 61. Wooden flute
- 62. Woodwind
- 63. Xylophone

64. No

ASK ALL WHO ARE NOT PLAYING AN INSTRUMENT (Q2=2)

3. Which of the following best describes your current work within the classical music sector? SINGLECODE

- 1. Most/all of my work is facilitating/leading workshops.
- 2. Most/all of my work is in performance/participation administration.
- 3. Most/all of my work is in general administration.
- 4. Other (please specify)

ASK ALL WHO WORK IN ADMINISTRATION (Q3=2/3)

**4. And which of the following best describes your area of function? SINGLECODE
RANDOMISE**

- 1. Artistic Director/ Senior Programmer/ Music Director
- 2. CEO
- 3. Orchestral management/ librarian
- 4. Learning & Participation
- 5. Professional services (e.g. finance/ HR/ marketing/ IT/ fundraising)
- 6. Other (please specify)
- 7. Don't know

ASK ALL

5. How many years have you been involved in the classical music sector? SINGLECODE

- 1. Less than a year
- 2. Between 1 and 2 years
- 3. Between 2 and 5 years
- 4. Between 5 and 10 years
- 5. Between 10 and 15 years
- 6. Between 15 and 25 years
- 7. Over 25 years
- 8. Don't know

ASK ALL

6. Thinking about your training and education in music, which of the following opportunities did you undertake? Please select all that apply. MULTICODE ROTATE

1. Free music tuition at a state school
2. Paid-for music tuition at a state school
3. Local bands, orchestras and/or other ensembles organised by local music services/music hub, state school or through the local community
4. Music tuition at a private school
5. Music tuition through an independent private teacher
6. Music tuition at a specialist music school
7. Music tuition through a junior conservatoire
8. Music tuition through higher education at a university
9. Music tuition through higher education at a conservatoire
10. Music tuition through higher education at another organisation or institution
11. Don't know/ not sure

SECTION C: PERCEPTIONS OF THE SECTOR

The following section will concentrate on your perceptions and experiences of the classical music sector. Please answer honestly.

ASK ALL

7. Which of these factors are most important to you when you are considering work in the sector? Please select all that apply. MULTICODE RANDOMISE

1. I can fit the work around my caring responsibilities (e.g. children, or other family members)
2. The work provides a regular and reliable source of income
3. The work is with other people I know and like
4. The work is with other people who are like me
5. I can travel safely and conveniently to the work
6. The work is prestigious
7. The work benefits my profile
8. The work is enjoyable
9. I like the working environment
10. My previous experiences of working with the organisation/company/ensemble
11. Other (please specify)
12. Don't know

ASK ALL

8. Thinking about your career so far, and your aspirations for the future, do you feel there are, or have been, barriers that restrict the opportunities available to you? SINGLECODE

1. Strongly disagree
2. Tend to disagree

3. Neither agree nor disagree
4. Tend to agree
5. Strongly agree
6. Don't know/ not sure

ASK WHO AGREE THAT THERE ARE OBSTACLES (Q8=4/5)

9. Please describe the barriers that you feel restrict, or have restricted, the opportunities available to you. SINGLECODE

1. OPEN END
2. Don't know

SECTION D: ABILITY TO BE OPEN

Thank you for your answers so far. This section will focus on how open you feel you are able to be within the classical music sector. Please answer 'prefer not to say' in order to skip questions which you are uncomfortable answering.

ASK ALL

10. Are you open about your gender identity and/or sexual orientation at your organisation? SINGLECODE

1. I am open with no one
2. I am open with some people
3. I am open with everyone
4. Prefer not to say

ASK ALL WITH A DISABILITY (D6a=1)

11. Are you open about your disability at your organisation? SINGLECODE

1. I am open with no one
2. I am open with some people
3. I am open with everyone
4. Prefer not to say

SECTION E: FINAL DEMOGRAPHICS

Thank you for answering these questions honestly. This final section will ask a series demographic-related questions. While you are not obliged to answer these questions, we would greatly value your answers.

ASK ALL

D7. Which of these do you live in? SINGLE CODE

1. East Midlands
2. East of England
3. London
4. North East
5. North West
6. Northern Ireland
7. South East
8. South West
9. West Midlands
10. Yorkshire and the Humber
11. Isle of Man
12. Scotland
13. Wales
14. Channel Islands
15. Prefer not to say

ASK ALL

D7a. And where were you born? SINGLE CODE

16. East Midlands
17. East of England
18. London
19. North East
20. North West
21. Northern Ireland
22. South East
23. South West
24. West Midlands
25. Yorkshire and the Humber
26. Isle of Man
27. Scotland
28. Wales
29. Channel Islands
30. Outside the UK (please specify)
31. Prefer not to say

ASK ALL

D.SEG We would also like to understand a little bit more about your background. Please select the occupation of the main/highest income earner in your household when you were 14 years old. SINGLECODE

1. Modern Professional Occupation: e.g. Teacher/lecturer, nurse, physiotherapist, social worker, welfare officer, actor, artist, musician, police officer (sergeant or above), software designer
2. Clerical and Intermediate Occupation: e.g. secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse
3. Senior Managers and Administrator: usually responsible for planning, organising and co-ordinating work for finance such as finance managers, chief executive etc
4. Technical and Craft Occupation: e.g. motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener, train driver
5. Semi-Routine Manual and Service Occupation: e.g. postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant
6. Routine Manual and Service Occupation: e.g. HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter/waitress, bar staff
7. Middle or Junior Manager: e.g. office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican
8. Traditional Professional Occupation: e.g. solicitor, accountant, medical practitioner, scientist, civil/mechanical engineer
9. Short Term Unemployed: Claimed Jobseeker's Allowance or earlier unemployment benefit for a year or less
10. Long Term Unemployed: Claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year
11. Retired
12. Don't know
13. Prefer not to say
14. Other – please specify

ASK ALL

D.PAR. Do/did your parents (including natural parents, adoptive parents, step-parents or guardians) have any higher education qualifications, such as a degree, diploma or certificate of higher education? SINGLECODE

1. Yes
2. No
3. Don't know
4. Prefer not to say

ASK ALL

D.PARb. Did your parents (including natural parents, adoptive parents, step-parents or guardians) have an interest in classical music when you were growing up? SINGLECODE

1. Yes, my parents took lessons as a child
2. Yes, they listened to classical music
3. Yes, they attended classical music concerts
4. Yes, they were involved in classical music in their leisure time
5. Yes, they had a career which involved classical music
6. Yes, other
7. No

8. Don't know

ASK ALL

D.R. Thank you very much for taking the time to share your views today. We are conducting further research relating to this topic. Would you be willing to be re-contacted to participate in this research? You will be contacted by ICM Unlimited, on behalf of the Arts Council England and no-one else. SINGLECODE

1. Yes (please enter your e-mail address)
2. No

ASK ALL

D.Rep. Arts Council England will be publishing a report based on the results from this survey. Would you like to be informed when the report is published? We will use your email address for the sole purpose of sending you the report. It will not be shared with anyone. SINGLECODE

1. Yes (please enter your e-mail address)
2. No

THANK AND CLOSE

