REMA / EARLY MUSIC IN EUROPE

REMA STUDIES

2019-2022 SURVEY RESULTS

IN PARTNERSHIP WITH
HENALLUX - HAUTE ÉCOLE DE NAMUR-LIÈGE-LUXEMBOURG

For the first time, REMA is launching a series of surveys aiming to quantify the evolution of early music related activities, their diversity, volume and specificities.

This first study was related to activities from 2019-2021. It targeted promoters as they were the core of REMA's membership during the years surveyed. The results can be seen as a photography of the state of programming, in 5 parts: Artistic programming, Finances, Audiences, Digital practices and Social and green responsibility. It took the effects of the covid crisis into account, using 2019 as a reference year, and documented the level of recovery of the sector from that crisis.

This survey was done in cooperation with Henallux, Haute Ecole de Namur Liège Luxembourg, and its laboratory Fors. The questionnaires were launched in April 2022 and addressed to all promoters with activities in the Early Music sector, REMA members or not. It was released in French, German and English.

What follows is an overview of the results, as they were presented to an online audience on 18 January 2023.

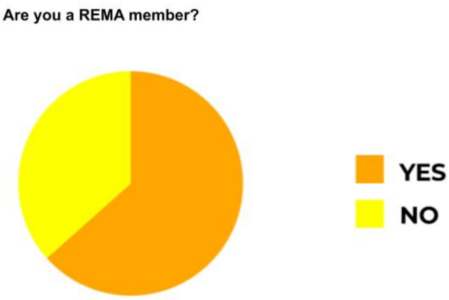
This is the main part of this study, focusing on the core activity of promoters, which is organizing concerts. It is separated in two parts: first, we gathered information on the effects of covid on programming activities, then, we showed trends on how the artistic decisions are made, as well as challenges for the future.

Overview

Are you a REMA member?

Yes — 63,4 %
No — 36,6 %

Total answers: 41



This survey received 41 answers – 2/3rds came from REMA members, mostly from Italy and France. These answers may be interpreted as coming from traditional, established members of the sector.

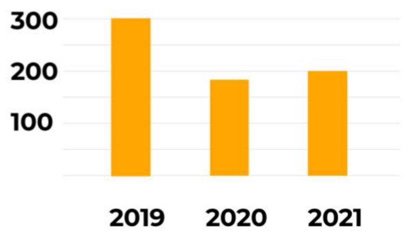
Impact of covid on the number of concerts

This is the beginning of our study on the impact of covid on EM programmes. The data includes all live online concerts, and onsite concerts with an audience.

Number of concerts organized:

2019 —- 300 (100%)
2020 —- 184 (-38%)
2021 —- 200 (-33%)

Total answers: 41



2019 has been used as a comparative basis as a "normal" year of activities.
In 2020, the number of concerts decreased by 38,6 %.
In 2021, a modest increase is visible (+8,7%).
This is not a total recovery, as this year was still impacted by covid.

This assessment will be completed during the follow-up in 2022-2023.

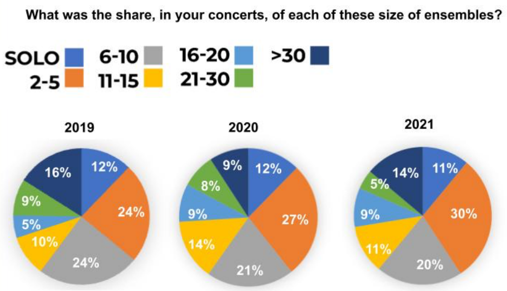
The impact on the number of concerts is not as strong as we might have imagined, as there were some easier moments in 2020 and promoters and artists showed an amazing creativity in organizing streamed concerts. However, the recovery in 2021 was also not as good as we had hoped for.
Following the different "waves" of restrictions in the different countries, the beginning of 2021 may have been strongly impacted, for example in Belgium which suffered from many cancellations, due to audience restrictions.

Number of artists per concerts

From 2019 to 2021, 2/3rds of the concerts involved less than 10 musicians.

What was the share, in your concerts, of each of these size of ensembles?

Total answers: 23

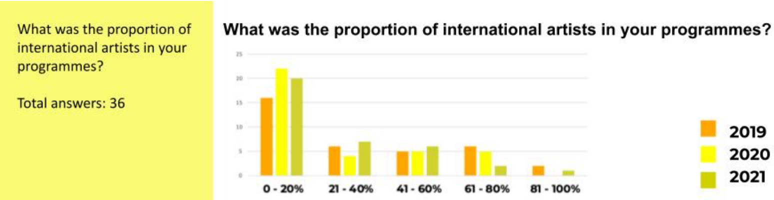


The most striking variation linked to covid is the decrease of the number of concerts with over 30 musicians in 2020, and more generally the decrease of concerts of "over 21" artists.

This confirms the direct impact of legal requirements for health reasons on artistic choices. There can be other explanations (balance between size of the audience and stage workforce, smaller budget for bigger concerts, distancing measures on stage making it more difficult to present bigger ensembles or making performing together more difficult for artists...)

Presence of international and local artists in the programmes

INTERNATIONAL ARTISTS



In the reference year **2019**, half of the answers (45.7%) situated the percentage of foreign ensembles and artists below 20%.

This is a lower amount than we expected, as the Early Music sector is based on the circulation of artists throughout Europe, and the diffusion of European repertoires. A bias is possible: the main countries are major promoters and artistic producers.

In **2020**, the “81 to 100% of foreign artists” segment disappeared. The “less than 20% of foreign artists” segment represents 60% of answers.

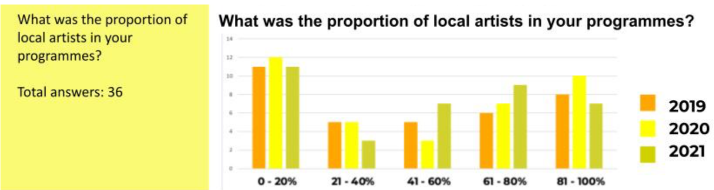
Many factors come together here, as programming local artists can be seen as a reasonable choice, motivated by logistics and risk management: (the impossibility to predict covid waves, disparities of regulations between countries...)

However, some periods of 2020 were not as “closed” for travel, especially in the summer when most festivals take place.

In **2021**, practices did not return to the reference numbers of 2019, though travel restrictions were no longer an issue: showing that covid also impacted, in the long term, the finances of promoters and/ or created new programming habits. All in all, this shows an undeniable decrease of the mobility of the artists, not as strong as we could have feared, but to be watched in the coming years.

LOCAL ARTISTS

Definition of local in this survey: “from less than 200 km away”. Depending on the country, these may be national but not local artists, hence the differences between these 2 graphs.



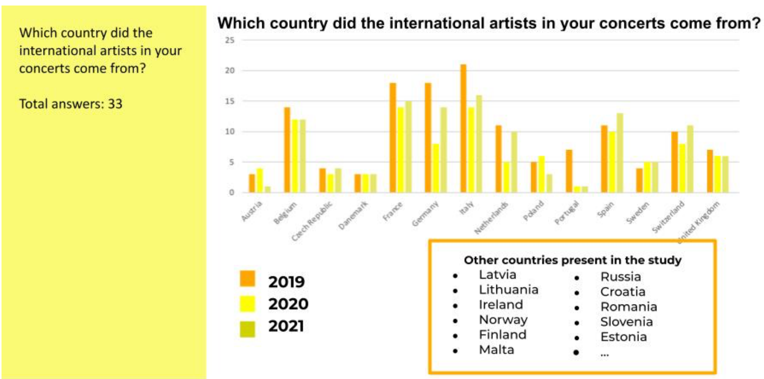
In **2019**, over half of the respondents reported between 41% and 100% of local artists in their concerts.

In **2020**, it was the same: artistic leaders heavily prioritized local artists for feasibility reasons, but also in the frame of a responsible movement to support local artists, having a direct impact on the artistic choices. This was sometimes influenced by dedicated national funding for the promotion of national artists. This may also be linked to a growing awareness of the ecological cost of inviting foreign artists.

In **2021**, although there was a tendency towards 2019 volumes, almost 2/3rds of answers mention programming more than 41% of local artists. It may be an indication of a long-term commitment of promoters to work with their local artists, which would be a major evolution of the sector.

Origin of the artists

Most represented countries are Italy, France/Germany, Netherlands/Spain, then Switzerland.

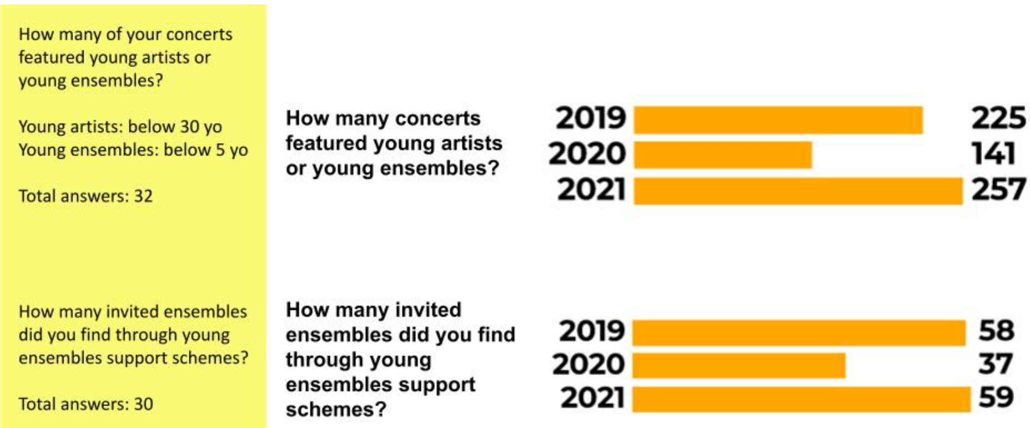


The situation varies, depending on each country and its response to covid:
Some countries benefited from travel grants and subsidies, resulting in an increase of the presence of ensembles abroad (e.g.: Spain in 2021)

The graph does not document all countries as we chose to focus on the countries with the highest volume of artists, to see clearer tendencies; but please ask if you'd like us to provide details on your country.
Some countries were scarcely present in 2020, but recovered in 2021: Netherlands (by 50%), Germany (40%), France.
Some countries' presence strongly decreases: Portugal, Poland, Austria. Canada disappeared in 2020.
This graph does not factor in the differences of legal requirements (testing) between countries that only impacted the ensembles.

Young ensembles and support schemes

Definition of young ensembles in this survey: "artists below 30, or ensembles less than 5 years old".



Related to the total number of concerts programmed each year, the increase of the proportion of young ensembles is quite significant. There were fewer concerts, but more concerts by young ensembles.
The motivations can be the cost of mature ensembles, or a voluntary choice to support the emerging scene, or dedicated funding. However, this has to be balanced with this survey's results on "first time guests" below.

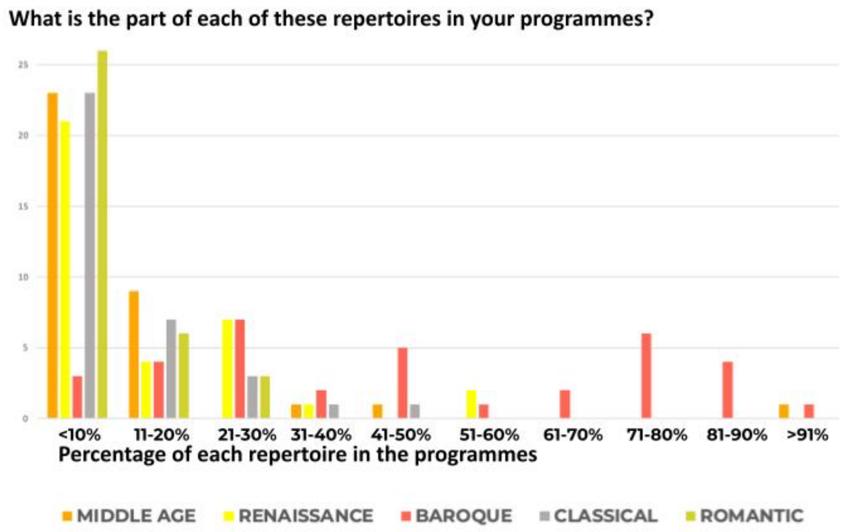
Main repertoires

This second part of the Artistic Programming survey shows a general picture of programming in 2022.

The following graph is based on the answers of 35 festivals or concert halls only, so we cannot take the numbers for granted, however it already shows a definite trend for each repertoire.

What is the part of each of these repertoires in your programmes?

Total answers: 35



The answers seem representative of what is mostly programmed in the Early Music sector and which markets are scarcer for ensembles of a certain repertoire:

- Medieval and Renaissance music are either never represented, or in specialized festivals.
- The representation of the baroque repertoire, often paired with other repertoires, is strong. It is the only repertoire that is almost always present, in various proportions. We can also imagine that sub-categories in "baroque" can be over/underrepresented, following artistic choices, but also audiences' expectations (or what promoters imagine them to be) and the willingness to take risks.
- Classical and Romantic music are underrepresented.

As most people taking this survey were REMA members, answers cannot really include Romantic/classical venues, nor smaller venues working outside REMA in a specialized repertoire.

How many of your concerts featured young artists or young ensembles?

Young artists: below 30 yo
Young ensembles: below 5 yo

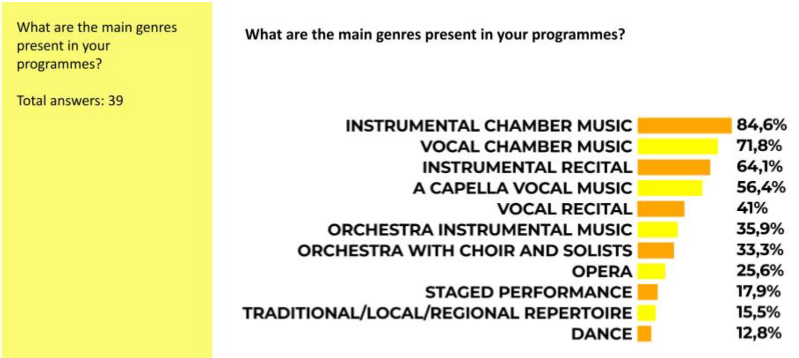
Total answers: 32

How many invited ensembles did you find through young ensembles support schemes?

Total answers: 30

Most represented musical genres.

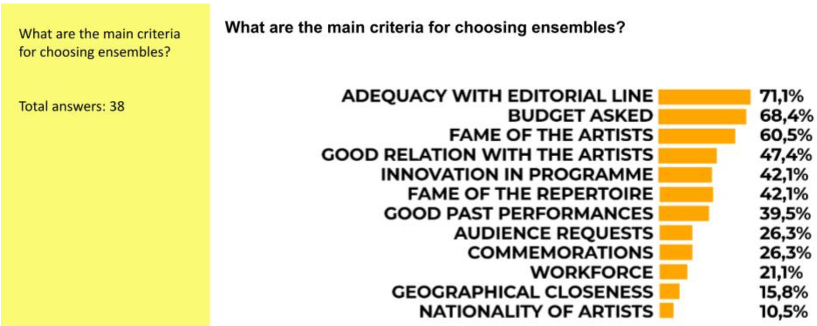
This slide is consistent with the previous one regarding the number of artists per concert: we are mainly dealing with small formations, with a focus on non-staged performance.
Small formations with a focus on the music, such as chamber music and recitals, and as opposed to staged performances, are connected to a venues' size and the means of the organisation, impacting what they program.



There are few big organisations that can welcome larger ensembles.
There are also fewer large ensembles.

Main criteria for choosing ensembles

The two following slides are merely informational for ensembles interested in working on their marketing techniques.

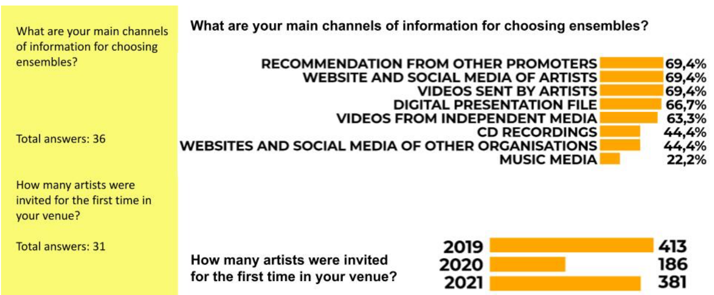


The most important factors are the artistic contents of the proposal, over budget; the artist's reputation and good relation skills may matter too.

The logistical criteria come surprisingly late, especially since they directly affect the #2 criterion of budget.

Main tools for choosing artists

The "traditional" media (critics, CD recordings) are at the bottom of this list. The most quoted criteria are digital materials that are a staple due to covid, or networking habits in which REMA may be useful.



Although the programming of new artists took a step back in 2020, it is now almost back to its 2019 level. It is a good sign of the return of the flexibility of promoters.

Challenges met by promoters in the future

What challenges do you see for the future?

Total answers: 28

#1 SECURE FUNDING
- Rising inflation and economic instability
- Obtain stable financing for festivals
- Maintaining public funds and reaching balance in private sponsors

#2 ARTISTIC CHALLENGES
- Artistic diversity of invited artists
- Bringing the music to new spaces
- Quality of partners and sponsors involved
- Performing new repertoires

#3 FIGHT AUDIENCES HESITANCY
- Get the audience back to the concert halls after the pandemic
- Audience Development and Diversity

#4 POLITICAL UNCERTAINTIES
- Brexit
- Place of culture in policies
- War
- Ecology

#5 CREATIVE OPPORTUNITIES
- Digital or video production of concerts
- Cultural tourism
- Educational programs

Two major challenges that emerge from these are:

- Finances (subsidies, budget balance)
- Audiences (recovering the audience after the covid period, finding new audiences)
-

The pandemic definitely had an impact on the financial stability and budget of operators in their core activity of artistic programming, and made them weaker for the upcoming crises of 2022.

We can still note that artistic directors still seem quite confident in their ability to maintain their activities, in spite of these challenges. Some “external” issues are listed, but the internal issues can be dealt with through creativity and fostering creation.

REMASTUDIES **FINANCES**

Remark :

This survey received fewer answers, as it necessitated thorough work to compile the data for each question.
Thus, the results cannot represent the entire sector, but they still provide useful insights into the situation and hint at trends to watch for in the future.

Overview

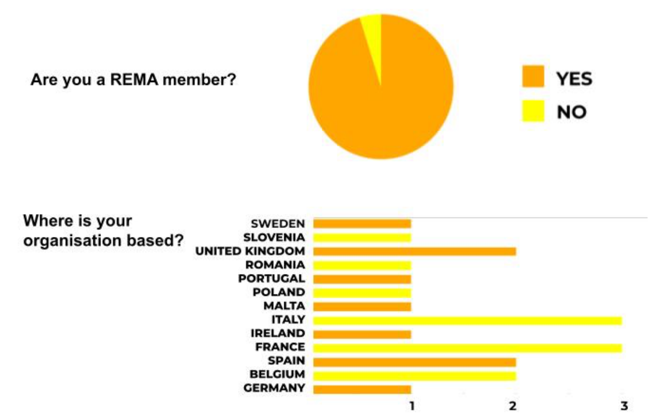
In this part, we look at the evolution of the funding and costs throughout the 2019-2021 period.
Mostly REMA members took this survey.

Are you a REMA member?

Yes — 90 %
No — 10 %

Where is your organisation based?

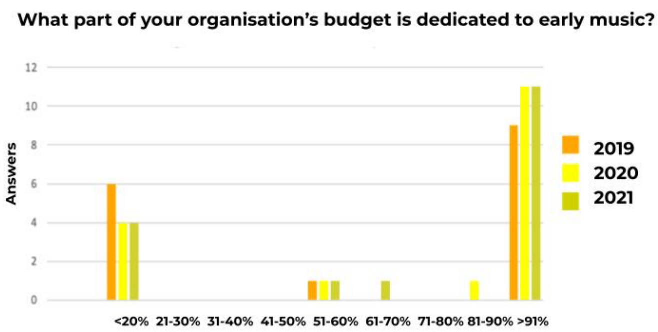
Total answers: 20



Respondents seem to be either non-specialized promoters, with a multi-disciplinary approach, or very specialized.

What part of your organisation's budget is dedicated to early music?

Total answers: 17



Costs: overview

This podium presents an overview of the distribution of costs for the full period 2019-2021.

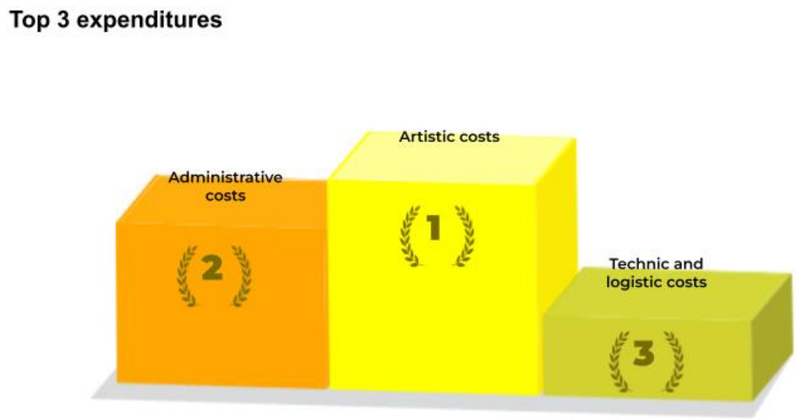
Technical and logistics
Remuneration of technicians and providers including various taxes and contributions, rental of equipment necessary for artistic performances, rental of instruments, reimbursement of volunteers

Administrative
Permanent staff and external providers including various taxes and contributions

Artistic
Artistic fees, transfer agreements, including various taxes and contributions related to artistic performances; does not include travel and accommodation.

Summary of answers related to costs in 2019, 2020 and 2021

Total answers: 48 (16 per year)



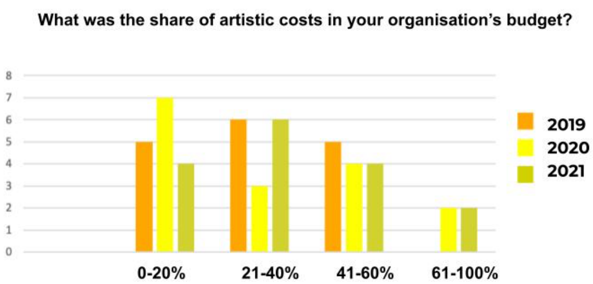
The questions targeted several categories of costs: administration, of artists fees, logistics, travel, accommodation and catering costs, mediation and education activities, marketing and communication, and taxes.

Share of artistic costs

In 2020, some organisations suddenly dedicated more than 60% of their budget to artistic costs, while the number of organisations dedicating less than 20% also grows.

What was the share of artistic costs in your organisation's budget?

Total answers: 16

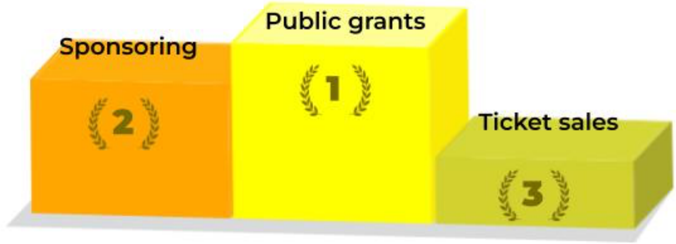


The trend for 2021 tended towards a less chaotic situation, closer to the 2019 situation. To be confirmed in 2024 for 2022-2024.

During the pandemic, the increase of "other" expenses (marketing and communication, seen as a means to maintain a connection with the audience), may explain the low numbers. The appearance of the highest share may be connected to the disruption of the normal functioning of organisations and the frequency of concerts organized with little technical means.

Revenue: overview

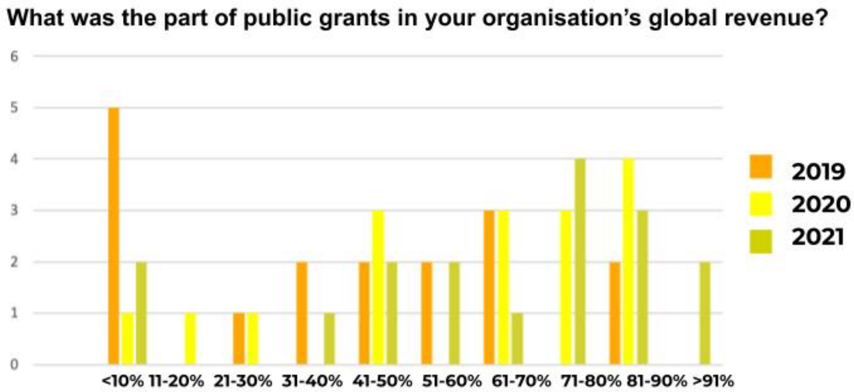
Summary based on answers related to revenue in 2019, 2020 and 2021



The organisations taking this survey seem to receive public funds consistently, but there are also a few very independent structures showing in 2019 - not 2020 nor 2021.

What was the part of public grants in your organisation's global revenue?

Total answers: 17

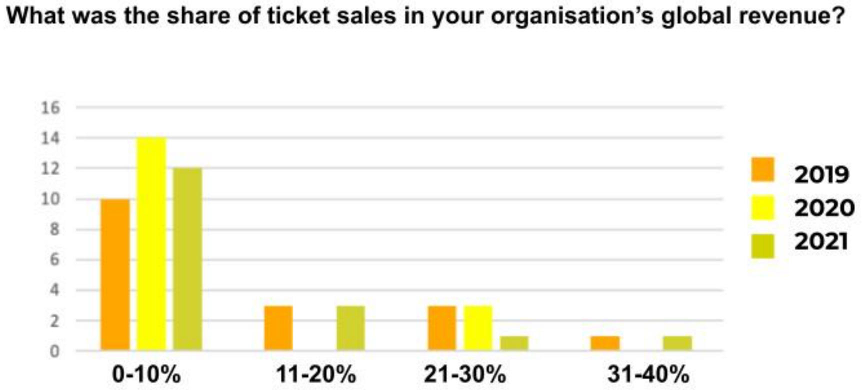


2020 showed a strong reliance on public funding, indicating the frailty of the organizations, continued for example in 2021 in the ">91%" share. This may include emergency subsidies, but also show the lack of internal revenue, which lowers the proportion of public funding from ticket sales.

Most countries have implemented the continuation of public funding, hence a higher representation of these funds in the answers.

What was the share of ticketing in your organisation's global revenue?

Total: 17 answers



The dramatic change in the funding situation was still in no comparison to the stronger disruption observed in the number of concerts for the same period.

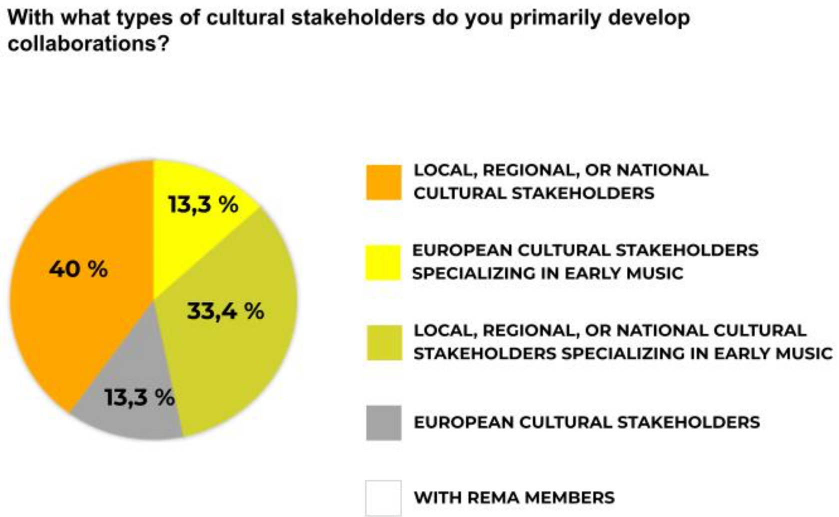
Ticket sales were mostly below 10%, in some cases below 20%. This share seems quite stable over the whole period.

In some cases, the revenue disappeared entirely in 2020.

Cooperation in the sector

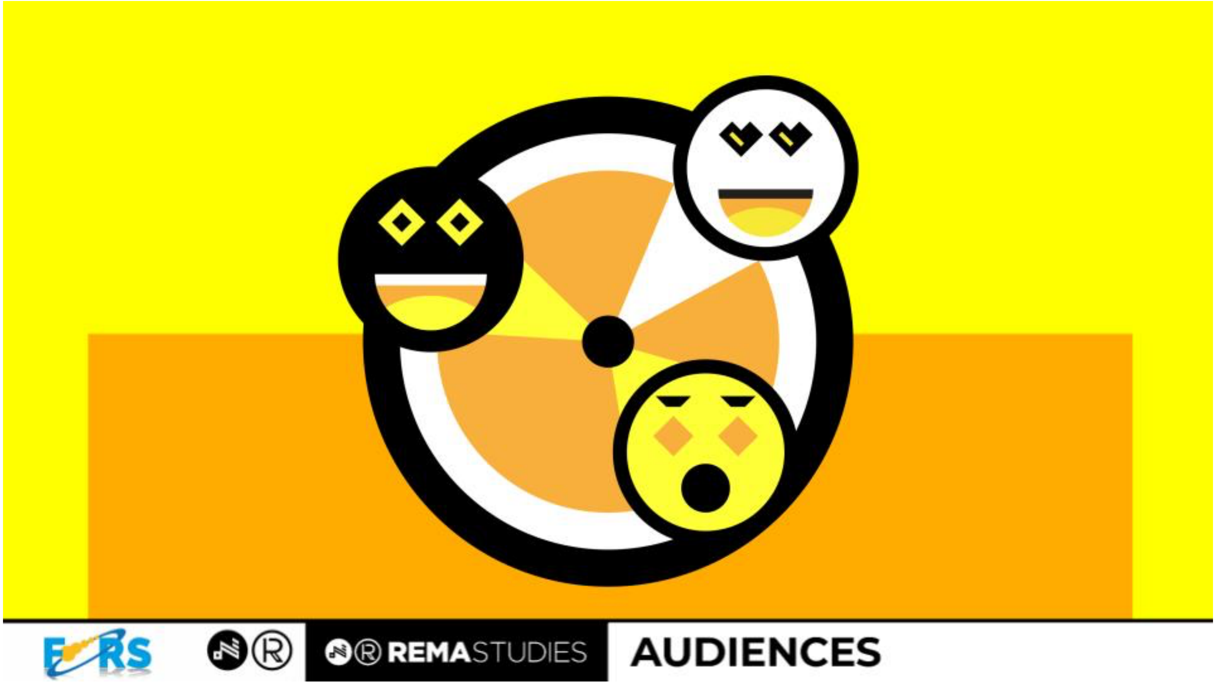
With what types of cultural stakeholders do you primarily develop collaborations?

Total answers: 15



Over half the answers mention local cooperation, drawing the picture of a sector rooted in local life and communities. The international/European connection is not as strong than we could have imagined.

The cooperation within REMA has strong potential for development: festivals, more than venues, may find common interests beyond geographical proximity; by activities/by interests/by period.



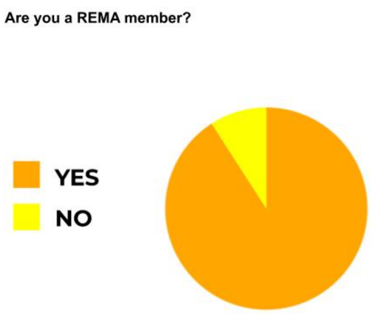
Overview

This survey looks at how the promoters are handling their audiences, again with trends in 2019-2021, but also with more general questions.

Are you a REMA member?

Yes — 90,9%
No — 9,1%

Total answers: 22



22 responses is a small sample, but the answers represent 13 countries which is quite varied.
Mostly REMA members responded, which points to more stable organizations with means for staff dedicated to audience management.

General knowledge

The respondents seem quite confident in their knowledge of their own audience (almost ¾ of them).
However, more than half of the respondents admit that they scarcely do audience surveys, which indicates that this knowledge is more often intuitive rather than reliable information.

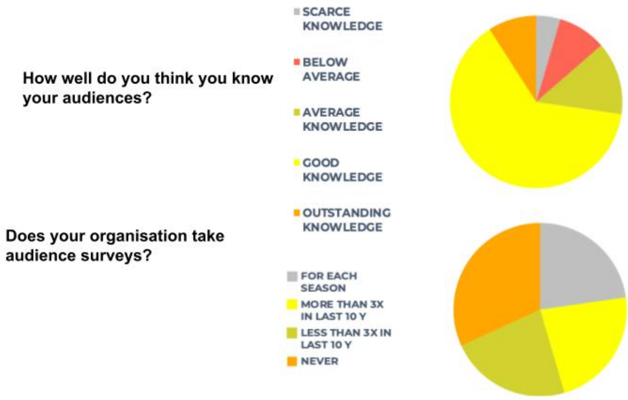
How well do you think you know your audiences?

Scarce knowledge —------ 4,5%
Below average —---------- 9,1%
Average knowledge—-- 13,1%
Good knowledge —----- 63,6%
Outstanding knowledge - 9,1%

Does your organisation take audience surveys?

For each season —-------- 22,7%
More than 3x in last 10 y 22,7%
Less than 3x in last 10 y 22,7%
Never—------------------- 31,9%

Total answers: 22



Cultural education activities

The practices are generally spread across the sector, but with a specificity: for the main part, it is the artists themselves that handle the realization.

Do you offer mediation, cultural or artistic education activities to your audiences?

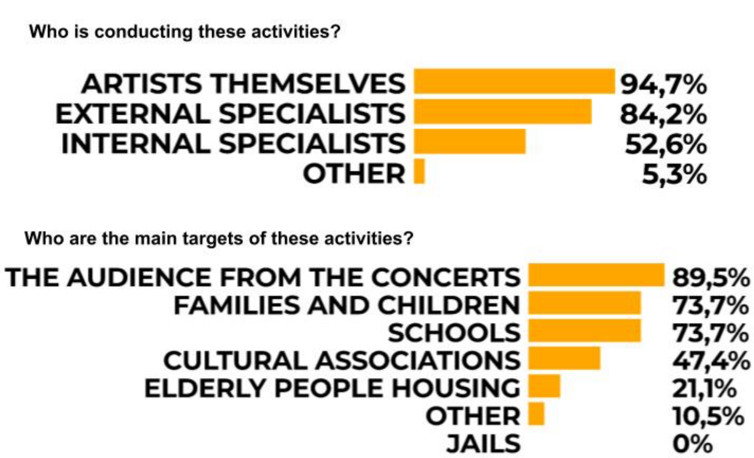
Yes — 86,4%
No — 13,6

Who is conducting these activities?

Total answers: 22

Who are the main targets of these activities?

Total answers: 19



This suggests one-shot actions at the moment of the concerts, instead of a more consistent year-long approach directed by education professionals.
Outreach activities, when present, hold a minor place in the budget: 1%-2% average. (information taken from the finances survey).

Loss of audiences through covid

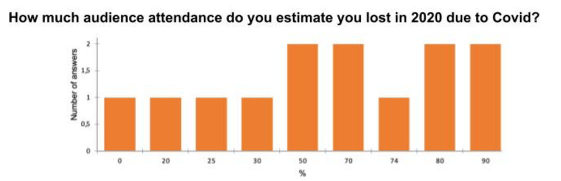
69% of responses admit the loss of more than 50% of their audiences in 2020 due to covid.

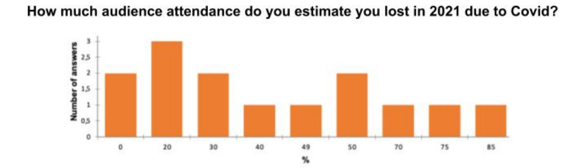
How much audience attendance do you estimate you lost in 2020 due to Covid?

Total answers: 11

How much audience attendance do you estimate you lost in 2021 due to Covid?

Total answers: 14



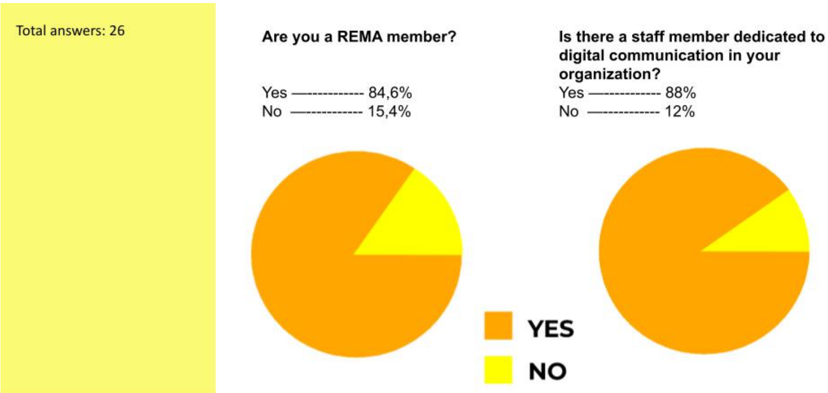


In 2021, losses were lower but still present, showing that the loss of audiences is not only due to legal restrictions, but a deep-rooted trend of new audience habits.

Identified as a major preoccupation of the sector, audience development, and the necessity to "get the audiences back to the concert venues after the pandemic" has been a much shared concern.
But it was mostly seen as an opportunity, through the development of new contents, the exploration of the possibilities of digital creation, of cultural tourism. Some responses acknowledged that there has been a significant shift in the audience's behaviours that needs to be investigated; some identify the need to train their staff to handle this new relation, and all in all it embraced it as a part of the promoters' job to find their audience: new paths are to be explored and new habits from promoters are to be created.

This part of the study provides a picture of post-covid practices, after a boom of online concerts and digital creation in 2020-2021.

After this period, where digital media were unavoidable for all active organizations (online concerts, monetization of online videos, digital creation...), we look here at the state of communication and digital practices in a stable period of 2021-2022, to study how the covid boom impacted the programming of early music in the long run.



Replies come mostly from REMA members.

88% of subjects have communication staff, which suggests stable organizations with stable financing.

Commonly used communication channels

Most respondents use a mix of traditional and digital methods, or mainly digital methods.

Total answers: 25

How do you communicate to your audience?
Traditional media only ---------------- 0%
Traditional media mostly ------------ 4%
Mixed media ---------------------------- 40%
Digital media mostly ---------------- 40%
Digital media only ------------------- 16%

How do you find the use of digital tools?
Very difficult----------------------------- 0%
Difficult ---------------------------------- 8%
Neither difficult nor easy ------------ 40%
Easy ------------------------------------- 36%
Very easy ------------------------------ 16%

More than 50% of respondents have fully transitioned to digital communication methods and find it normally easy to do. This hints at a sector that has fulfilled its transition and is now digitally fluent. We can only imagine that covid has boosted this transition.

However, when we look at the tools that are mostly used, they seem quite traditional; the respondents' use and knowledge of internet, social media and digital tools is reliable, but not avant-garde.

Total answers: 25

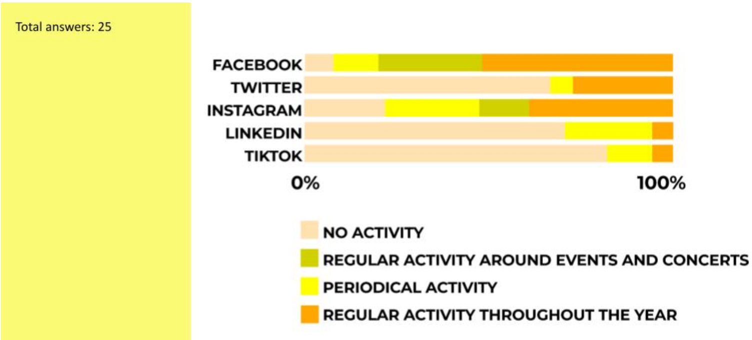
Website, Youtube, newsletters are at the top of the list.
84% users of social network is a low result.

The organizations may not be looking for innovation in their communication strategy because they have found that traditional methods are sufficient for their needs, or they may not have the resources or expertise to implement more advanced digital strategies.

Frequently used social media platforms

This traditional characteristic is also visible in the detail of social media platforms:

There is a lot of potential development of the presence on the newest platforms.

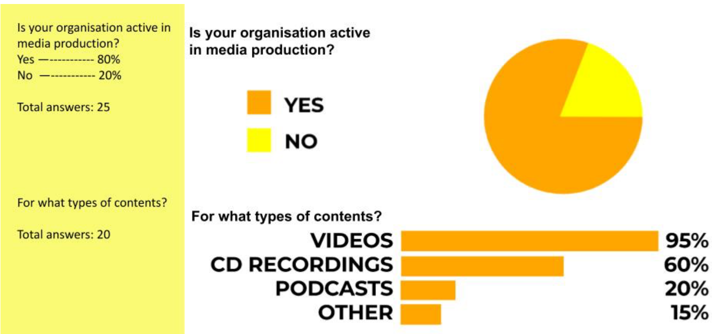


YouTube is absent from the list, but as seen previously it had 52% of users.
“Periodical activity” is quite rare, which is a good sign as most media strategies are more effective when they are implemented regularly.

Facebook represents the “go-to” social media; it is often described as appropriate for the generation of the core audience of early music, however, it is now a saturated market, and there is much more potential development, (new users to target, and younger users too) on other platforms.

Contents production

This slide hints at a specificity of Early Music concert producers, who make use of their position to double as video producers, record labels or work in partnership with them.



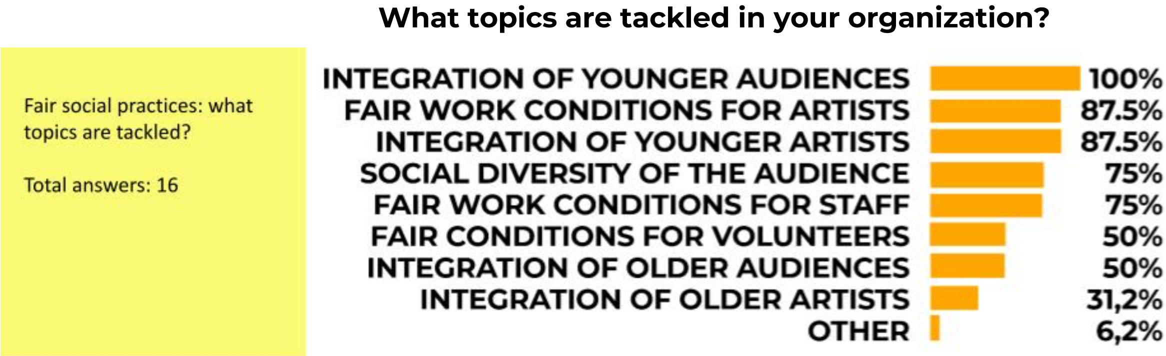
Digital recordings may also be included in “other”, but all in all the recording activities are quite high.
It was noted earlier that only 52% answers mention the use of YouTube, which is now surprising given the level of activities.

We can assume that this is a new use brought or popularized by covid, that raised the level of expectations and the skills of the organisations.

Overview

This survey received 25 answers, which is not much and shows that the organisations targeted by this survey may not feel well-equipped to contribute on this topic.
However, this survey was related to activities up to 2021 only, before the current energy crisis, and was answered before 21 May 2022. It was also launched before the first workshop of REMA's Transition Scheme for members.

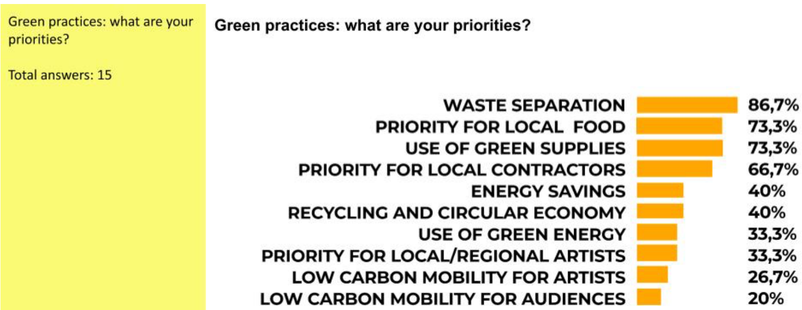
Social responsibility



The integration of young audiences is the only theme tackled by 100% of participating organizations. It is also the easiest theme in the propositions, as it is usually already handled in the organisations. It does not require in-depth disruption of an organization, and is often implemented in relation to other priorities such as audience development)

Green responsibility

The next survey needs to be replaced in the context of the first half of 2022, when energy savings were not a priority.



The top answer is often a legal requirement; the bottom answers show the potential for greener practices.

There may be incentives to act greener (long-term economic, aligning with the public mobilization in this direction, legal obligation, funding that supports it/requires it)

There may also be deterrents to tackle the more ambitious topics of green mobility for artists, as it is close to the core activity of programming and necessitates external and internal means to be achievable. These actions are not prioritized, however they would represent a huge progress as the impact would be major.

Audience mobility is often the most polluting activity on the list (from concert halls having calculated their carbon footprint) and it is here at the bottom of the list. This also suggests potential actions for the future. In a positive way, this may be a tool to mobilize the audiences back to the concert halls.

The first chart below was aimed at organisations that haven't developed a program yet.

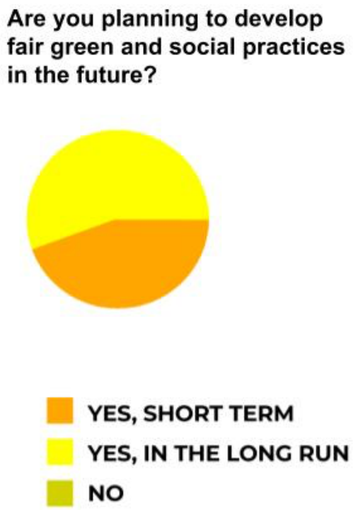
In the second chart, the "rather agree" answer may signify that green and social practices are not equally important.

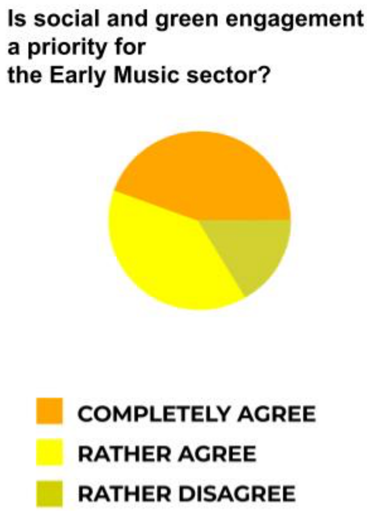
Are you planning to develop fair green and social practices in the future?

Total answers: 9
Yes, short term —------- 44,4%
Yes, in the long run —- 55,6%
No —--------------------------- 0%

Is social and green engagement a priority for the Early Music sector?

Total answers: 25
Rather disagree—--------- 16%
Rather agree —----------- 40%
Totally agree —------------ 44%





While the first question here was addressed at organisations that claimed not to have implemented a fair and green policy yet, the second chart indicates that there is a significant interest in developing fair, green and social practices within the early music sector. While there may be some variation in the level of prioritization, the majority of respondents are planning to implement these practices in the future, as their different levels of resources and capacity allow them to do.

REMA's thanks go to all the participants who took the time to take these surveys and offer an overview of their own experience from the past 3 years. We hope that the result of this study also underlines the positive aspects of this period.
The REMA Studies will continue in 2023 with a new survey, dedicated this time to the qualitative aspects of Early Music, after this first, very quantitative study. The idea will be to share what Early Music means in terms of personal experience for all who are involved (artists, audiences, promoters, students, researchers...).

In 2024, the surveys will be more qualitative again, resuming the analysis for the year 2022-2024, but also broadening the scope by involving ensembles, artists and study and other categories of early Music actor.

For any question on this survey or cooperation for the next ones, please get in touch with the REMA staff at info@rema-eemn.net