

**ROYAL  
PHILHARMONIC  
ORCHESTRA**

# Embracing the future with confidence: The evolution of the orchestral audience in the digital age

A research study by the Royal Philharmonic Orchestra

March 2024



Report Overview	3
Executive Summary	5
About the Royal Philharmonic Orchestra	6
Research Methodology	6
Chapter 1: The orchestral world in 2023: A year of new discoveries and new definitions	7
Assessment	12
Chapter 2: The orchestral audience in 2024: The joy of music discovery for everyone	13
Group 1: Life-long orchestral advocates	15
Group 2: Music students	17
Group 3: New discoverers	19
Group 4: Casual followers	21
Group 5: First-time joiners	23
Assessment	24
Chapter 3: Orchestral music in 2024 and beyond: Embracing change in the digital age	25
i) Music streaming – positive or negative impacts?	25
ii) Algorithms vs human choice	27
iii) Channels for music discovery	28
iv) Beyond digital: alternative music discovery sources	30
v) The digital concert hall of 2034	31
Assessment	33
Conclusion	34

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## Report Overview

**James Williams, Managing Director of the Royal Philharmonic Orchestra**

Over the last two years, the performing arts and particularly live music have fought to rebuild and recover after the seismic challenges of the pandemic and the succession of national lockdowns. Whilst the Covid era posed enormous financial challenges for many arts organisations, the public's confident return to major festivals and concert halls in 2023 marked a complete transformation compared to the summer of 2020. At that time, the financial outlook for venues and ensembles appeared bleak, and consumer confidence in attending large social gatherings was shattered, while today we are in an entirely different place.

Our previous research reports have looked in detail at how consumers maintained a connection with orchestral music during the pandemic years and through the economic challenges that followed. Whilst the return of people to the concert hall is welcomed—and much needed by all ensembles and venues around the country—work remains to be done to evolve our art form and adapt to an ever-changing society.

As this new report for 2024 will reveal, people's preferences for the kind of classical music they want to enjoy are changing. These changes result from another new trend—the orchestral audience is itself evolving and diversifying, and some of this is a result of music habits established and discoveries made during the lockdown era. Technological innovations are also changing people's terms of engagement with the genre, underpinning their views of what is possible and what might be next. Technology was central to helping many people remain engaged with music during the pandemic, and its influence has grown in the post-lockdown era.

Despite these changes, the symphonic repertoire remains at the core of people's journeys of discovery and their sense of cultural enrichment. What the new data suggests is that there is no conflict—no either/or—between 'popular' and 'serious' repertoire. Instead, people have different starting points with the genre, and the more access points there are for people new to the genre, the more likely it is that those people will move on to discover the timeless works of the great composers.

Our tracking research over the last seven years has served as a marker of these changes, highlighting how musical engagement, listening habits, and changing lifestyles have evolved and diversified—and celebrating this breadth is why we embrace the term 'orchestral music' over 'classical music'. The orchestral world is for everyone: our mission at the Royal Philharmonic Orchestra (RPO) is to be fully inclusive and to open the genre to the broadest audience so that everyone has the same possibility of enjoying an enriching journey of music discovery.

Change is something to be embraced not feared—and for orchestras, change means seizing the opportunity to grow and evolve. At the RPO, we are committed to remaining at the forefront of this ever-changing musical landscape, continuing to bring the power and beauty of orchestral music to audiences old and new. As we forge ahead, we do so with a sense of excitement and responsibility, keenly aware that we are not just witnesses to this transformation in musical engagement, but active shapers of its future.



Photo: Richard Ion

## Executive Summary

### New discoveries

**Five-year peak:** The number of people that would like to experience an orchestral concert rose from 79% in 2018 to 84% in 2023.

**Surge in discovery:** When it comes to the new music genres that people want to discover, orchestral/classical music had the biggest net increase in popularity (up 10% to 25% in the last year), with year-on-year gains also for opera (up 5%), and music from the musicals (up 4%).

**Different orchestral formats:** Six orchestral concert formats have grown in popularity since 2018, including music from musicals, film soundtracks, pop/classical crossovers, TV soundtracks, family-friendly concerts, and video game soundtracks concerts.

### New audiences

**Newcomers outnumber the established audience:** The new and emerging audience for orchestral music is now bigger than the long-established audience. More than half (54%) of today's orchestral audience comprises people starting a journey of musical discovery, compared with 31% of respondents who were long established classical music enthusiasts.

**Audience demographics:** Today's orchestral audience is made up of five clearly defined groups with different preferences and terms of engagement: life-long orchestral advocates, vocational students, new discoverers, casual fans, and first-time joiners.

**Most eclectic:** Whilst music students are the people most likely (30%) to enjoy a core repertoire of modern or contemporary composers, they are also the most likely to emphasise the need for orchestral music to connect more with popular and contemporary culture.

### New technology

**Transformation in musical engagement:** Two thirds of adults (64%) said that music streaming sites have changed their engagement with music.

**Hostility to algorithms:** Only 6% of under-25s and 1% of orchestral fans trust algorithms for their music choices.

**New media adoption:** Around one in 10 young people are already engaging with cutting-edge forms of media, such as augmented reality, and in-game virtual reality music experiences.

**Lingering effects of lockdown:** 16% of people continue to stream live sets online, and online concerts (11%) and artist Q&As (9%) continue to be popular.

**Future of concerts:** 60% of orchestral enthusiasts can envisage a completely different concert experience on stage within the next 10 years.

# About the Royal Philharmonic Orchestra

The Royal Philharmonic Orchestra (RPO) has a clear mission to enrich lives through orchestral experiences that are uncompromising in their excellence, wide-ranging in their appeal, and inclusive in their delivery. Typically performing approximately 200 concerts a year and with a worldwide live and online audience of more than 60 million people, the Orchestra is proud to embrace a broad repertoire and reach a diverse audience

The RPO aims to place orchestral music at the heart of contemporary society, collaborating with creative partners to foster a deeper engagement with communities to ensure that live orchestral music is accessible to the most inclusive and diverse audience possible. To achieve this, in 1993 the Orchestra launched RPO Resound which, over the last 30 years, has become the most innovative and respected orchestral community and education programme in the UK and internationally.

<https://www.rpo.co.uk>  
<https://www.rpo.co.uk/whats-on/icons-rediscovered-23-24>

# Research Methodology

The research used for this report (unless otherwise specified and credited) was conducted for the Royal Philharmonic Orchestra by international research company Sago Research.

The research was undertaken at regular intervals over the last 7 years. Each survey was conducted among a GB representative sample of 2,000 adults across the UK. The surveys were carried out online.

Highlights of the research appear in this report. Other material has previously been shared publicly, and more information can be found at the RPO website: <https://www.rpo.co.uk>.

# Chapter 1

## The orchestral world in 2023: A year of new discoveries and new definitions

This chapter explores the positive forms of engagement with the orchestral genre following the pandemic. Looking back at highlights from our research through 2023, we share insights on the types of concerts people were most interested in going to, their appetite for exploring and learning more, and the most popular means of engagement with the genre outside the concert hall. Bringing these findings together, the research presents a picture of people discovering the genre in new ways, and with that comes a new definition—the new era of ‘orchestral music’ superseding the term ‘classical music’, which is too narrow to describe the breadth of interest, the variety of tastes, and the forms of discovery shaping the growth and evolution of the genre in the post-pandemic age.

### i) Appetite for different types of concerts

With confidence returning, and restrictions in attending performances well and truly behind us, the RPO’s research looked at people’s appetite for attending any form of orchestral concert, and what type of performances people might consider.

One of the highlights from the findings is the noticeable jump in people’s openness to attending an orchestral concert of some sort in the next year—up from 76% in 2022 to 84% in 2023. This figure also surpassed the pre-pandemic benchmark of 79% set in 2019.

Table 1: Proportion of adults who would be interested in attending any sort of orchestral concert in the next year:

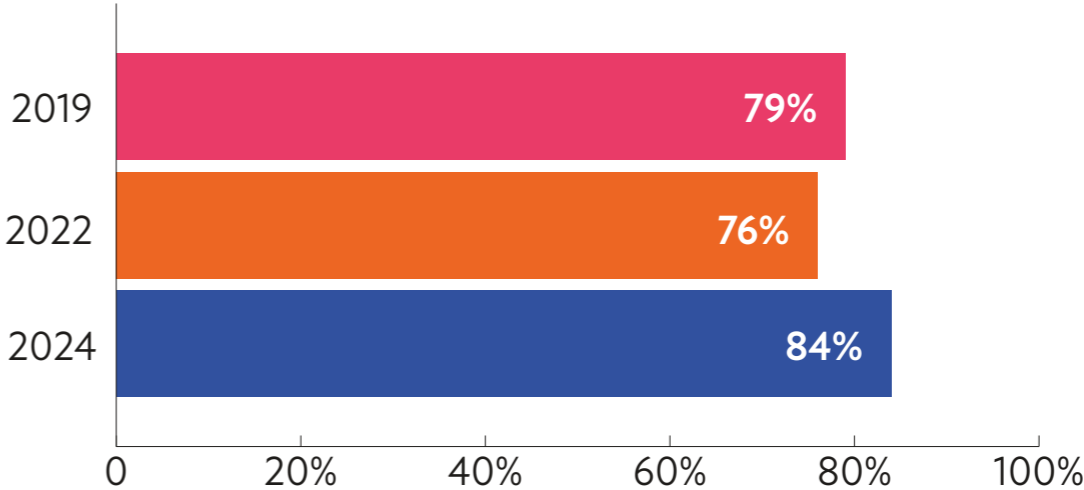


Photo: Ben Wright



Photo: Danny Khan

Looking at the type of orchestral concert people were most interested in, there was a variety of responses extending well beyond the traditional symphonic format and, to some extent, this reflects the wide range of concert formats that have emerged over the last decade or two.

In fact, for the first time, the appeal of ‘standard;’ concerts featuring traditional symphonic repertoire was knocked off the top spot, surpassed by concerts featuring hits from musicals (34%). In addition to concerts celebrating musical theatre, five other concert formats have consistently grown in popularity since 2018. These include concerts featuring film soundtracks (30% in 2023, up 3% on 2018), pop/classical crossover (up 5% to 31%), TV soundtracks (up 6% to 26%), family-friendly concerts (up 10% to 26%) and video game soundtracks (rising from 3% to 11%).

However, some concert types saw a slight dip in popularity. Film screenings with live orchestra playing the soundtrack (25%, -3%), orchestral classic rock concerts (23%, -4%), contemporary orchestral music (17%, -2%), and chamber music, performed by small ensembles, (12%, -6%) all saw a slight reduction from the 2018 figures.

### ii) Plans to broaden horizons and learn more

Our annual research consistently shows that people are strongly interested in deepening their understanding of specific genres, particularly orchestral music. This not only gives us insight into their appetite to discover more, but also helps us to understand where orchestral music stands in 2023, compared to other genres and art forms that people are interested in exploring.

Our research revealed that in 2023 a significant majority (79%) were keen to explore new or unfamiliar music genres during the year. While pop and rock featured as the two most popular choices, it was orchestral/classical music that had the biggest net increase in popularity (up 10% to 25%), with year-on-year gains also for opera (up 5%), and music from the musicals (up 4%).

Interest in learning about orchestral music was uniform across different age groups, with a slight increase among older people: 30% of people aged over 55 expressed an interest in learning about orchestral music, compared with 23% of those aged under 35. Considered by region, Scotland had the highest proportion at 34%, followed by Northern Ireland at 27%, while the Midlands showed the lowest interest levels at 22%.

Table 2: Percentage of UK adults interested in discovering new music genres

	2023	2022	Year on year change (+/-)
Pop	36%	33%	-3%
Rock	29%	27%	-2%
R&B	26%	23%	+3%
<b>Orchestral/ classical</b>	<b>25%</b>	<b>15%</b>	<b>+10%</b>
Musicals	23%	19%	+4%
Country	24%	19%	+5%
Dance	22%	20%	+2%
Jazz	19%	15%	+4%
Rap	15%	15%	0%
Opera	14%	9%	+5%
Folk	13%	11%	+2%
Metal	12%	10%	+2%
Latin	11%	9%	+2%
Gospel	11%	7%	+4%
African	10%	6%	+4%
Oriental	5%	4%	+1%
Other	3%	2%	+1%

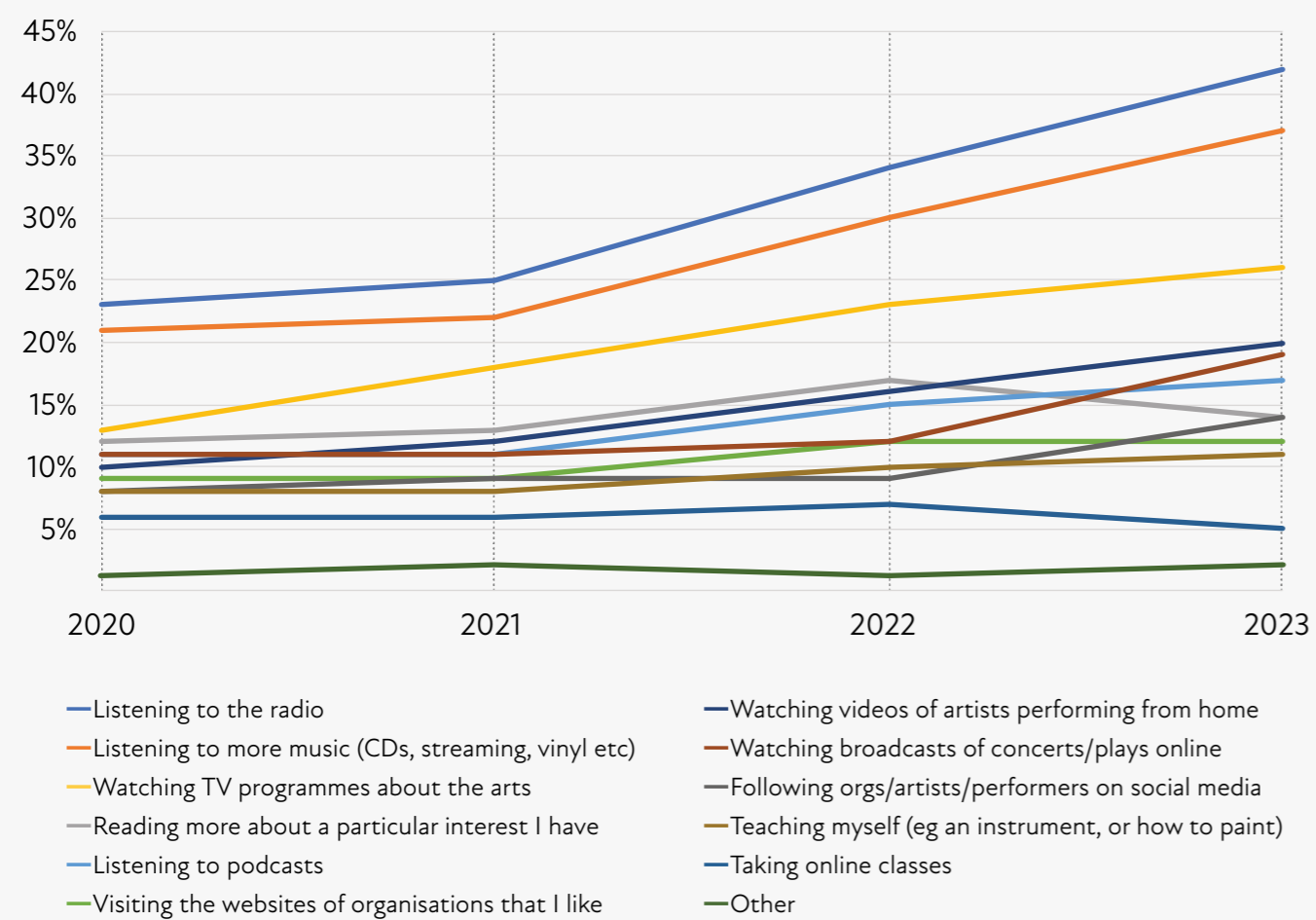
### iii) Beyond the Concert Hall: the ways people choose to engage with orchestral music

A key part of our tracking research looks at the ways in which people engage with orchestral music as part of their daily lives, outside the concert hall—understanding how they listen, not just what they listen to.

Looking at how people engage with the arts, there were four activities where participation levels have approximately doubled since the 2020 lockdown. These include tuning into radio broadcasts (42% in 2023, up from 19% in 2020); enjoying more music through CDs, streaming, or vinyl (up 16% to 37%); watching television programmes focused on the arts (doubling to 26%); and viewing online videos featuring artists (doubling to 20%).

Other activities that saw modest rises included reading more about particular artists or ensembles (14%, +2%); listening to podcasts (17%, +6%); and visiting the websites of arts organisations that they liked (12%, +3%).

Table 3: How people listen to orchestral music outside the concert hall



Significantly, the number of people engaging with orchestral music through these media outside the concert hall has increased since the lockdown years of social restrictions. During this time, the RPO noted a peak in the proportion of people maintaining a connection to the genre at a time when concert halls were closed. The fact that this level of engagement has risen not fallen since Covid restrictions ended, suggests that the habits people adopted during lockdown have remained and have been built on in subsequent years. This helps to explain the resurgent interest in the genre—the heightened levels of discovery at home helped to fuel an interest in attending a concert.

Table 4: Net percentage of people that have found ways to fulfil their interest in the performing arts outside the concert hall

2020	2021	2022	2023
59%	59%	71%	80%

#### iv) Day-to-day listening

The Royal Philharmonic Orchestra’s research also explored where and when people listen to orchestral music, during their working day, or as part of their daily routines.

First and foremost, the data revealed a significant increase in the number of people incorporating orchestral music into their daily routines, compared to pre-pandemic levels. In 2018, 65% of people could point to at least one situation in their lives where they would choose to listen to orchestral music as part of their daily routine. By 2023, this figure had risen to 77%.

The shift in listening habits mirrors the significant lifestyle changes since 2018. With remote working becoming more common post-pandemic, there’s been an upturn in the number of people who listen to music during various activities, such as exercising (12%), working (14%), cooking (18%), and gardening (13%).

The data also suggested that people are increasingly turning to orchestral music for personal wellbeing. Since 2018, there has been a rise in the percentage of people enjoying orchestral music as a backdrop for a range of calming activities, such as going to sleep (16%) relaxing in the bath (14%) and reading (16%).

With more people working from home since the pandemic, fewer people listen to orchestral music while commuting or travelling—yet more people enjoy the genre around the house as part of their daily routine.

Table 5: Everyday situations where people choose to listen to orchestral music

	2023	2018
When doing housework (e.g., ironing, cleaning etc.)	19%	19%
Whilst travelling (e.g. in a car, public transport, flight etc.)	18%	30%
When cooking	18%	14%
While reading	16%	15%
While going to sleep	16%	9%
When working	14%	8%
When in the bath	14%	8%
When in the garden	13%	5%
While exercising	12%	5%
When hosting a dinner party	9%	5%
To wake me up in the morning	8%	4%
While making love	6%	2%
Other	4%	6%
Don't know/ can't recall	4%	8%

# Assessment

## Vasily Petrenko, Music Director of the Royal Philharmonic Orchestra comments:

“Whilst the return to live music venues is not uniform across the country and across music genres, the RPO data underscores a firm and resurgent interest in orchestral music. Forms of online music discovery adopted during the lockdown era have endured as long-term habits: more people are listening to orchestral music as part of their everyday routines—and more people have expressed interest in experiencing orchestral music and a broad range of musical genres.

Increased engagement with orchestral music during routine activities, such as exercising, working—and even during personal wellness routines—signals a deeper integration of this genre into the personal lives of individuals. The change in consumption habits reflects the evolving relationship between the audience and music, transcending the confines of concert halls into the realm of everyday life. To be clear, this does not represent any form of dilution or a move away from the concert hall. In fact, the more that people start journeys of orchestral discovery outside the hall, the more likely people are to attend a concert. The orchestral audience is growing and diversifying, and if orchestras and venues can respond fully to these changes then the outlook for the genre is wholly positive.”



Photo: Andy Paradise

# Chapter 2

## The orchestral audience in 2024: The joy of music discovery for everyone

In summer 2023, the Royal Philharmonic Orchestra’s tracking research revealed that the number of people who would like to experience an orchestral concert had hit a five-year peak—up from 79% in 2018 to 84% in 2023. This rising popularity of orchestral music correlated with another significant dynamic for the orchestral world—audience numbers are growing.

Over the last year, the RPO has explored the make-up of the orchestral audience, and the research suggests that the new and emerging audience for orchestral music is bigger than the long-established audience. For this exercise, the RPO researchers located people who identified as being interested in the orchestral genre, and then asked them where they were on their musical journey.

- Overall, 31% of respondents were long-established music enthusiasts, who had enjoyed their musical journey for many years and could be classed as having a mature or sophisticated appreciation of the orchestral genre. A further 6% of the sample were music students wanting to broaden their critical knowledge of the genre.
- Set against this, around 54% of the UK sample comprised people who were starting a journey of discovery, taking first steps, or casually enjoying the genre alongside other forms of music.

Table 6: Constitution of today’s orchestral audience

Established and seriously involved audiences	
I have enjoyed classical music for many years	31%
I am studying music/learning an instrument and want to broaden my experience of the genre	6%
Emerging and evolving audiences	
I am discovering / pretty new to the genre, by no means an expert, but there are pieces of music I enjoy	12%
I like it, it's not my favourite genre of music but I listen to it from time to time when I fancy something different to listen to	30%
It's a genre of music I know very little about, but I would be interested in giving it a go	12%
None of the above / I don't have a relationship with classical/orchestral music	8%



These findings shed new light on the debate about how orchestral music needs to evolve. Past research from the RPO has looked in detail at what needs to happen to engage young people with the orchestral world, to support access to music lessons in the classroom, and how to encourage concert experiences from a young age. The RPO Resound programme has been leading industry work on community and education outreach for the last 30 years; the findings from the RPO’s education research were reported in our last annual report published in 2023. The RPO’s latest data sheds important new light on the debate, namely that growing the orchestral audience goes well beyond bringing young people into the orchestral world. People of all ages and backgrounds are open-minded about considering orchestral music as a genre to embrace and explore.

For this chapter, we review the attitudinal typologies identified from the research – and, for each group, the audience’s terms of engagement with orchestral music. The findings here elucidate what orchestras and venues need to do to broaden their appeal to new audiences interested in starting or continuing a journey of music discovery. Across many of these groups, there is a healthy interplay between accessible and more demanding repertoire. Orchestral music can be challenging, but it can also be fun.

## Group 1: Life-long orchestral advocates

Almost a third of people (31%) who like orchestral music are life-long enthusiasts, who have been enjoying/exploring music for some time, who like to compare and contrast performances of key works, and who enjoy both recorded and live performances.

Whilst 46% of this group are aged over 50—deep interest and knowledge often comes with age—the research also shows that many younger people class themselves as committed advocates of the genre. Geographically, these group members were most likely to live in London or Scotland (16% and 12% respectively).

When it comes to musical preferences within the orchestral genre, this group is most likely to enjoy the core symphonic repertoire (46%), although they also like variety. They enjoy other orchestral music forms, including pop and rock music featuring an orchestral treatment (14%) and the warm welcome of family-oriented concerts (12%).

Whilst orchestral music was a dominant top choice for this group (47%) by a significant margin, people also enjoyed music from the pop (26%) operatic (26%) and rock (25%) genres.

This group was most likely to prefer a live concert experience (31%). However, whilst a traditional repertoire was the top preference, even the most serious classical enthusiasts are hungry for a diverse range of concerts – both serious and fun.

Outside the concert hall, classical radio emerged as the platform most often used for people to enjoy the orchestral genre and performing arts more generally. There was also a high level of engagement in terms of listening to recorded music through streaming sites, or via a physical music collection at home.

### Top five orchestral concerts

- Traditional repertoire 52%
- Film soundtracks 36%
- Hits from the musicals 30%
- Film screening with live orchestra 32%
- Pop / classical crossover 31%

Photo: Ben Wright

### Most common ways people stay engaged with orchestral music

- Radio 51%
- Listen to recorded music 42%
- TV programmes on arts 41%



Photo: Ben Wright



## Shehara de Soysa's story of discovery

### Shahara is a member of the RPO Young Professionals Club

"My earliest memory of orchestral music is actually one of my earliest memories as a young child, attending a concert for children at the Sydney Opera House. Early exposure to classical music through my mother's musical influence deeply embedded my appreciation of classical music. Despite recognising the commercial importance and audience-broadening potential of other forms of orchestral music, such as pop and rock with orchestral backing or film scores, my preference remains steadfastly with the core masterworks. This traditional repertoire showcases composers' brilliance, conductors' mastery and interpretation, and the immense skill of the musicians, individually and collectively. These expansive works are an emotive form of expression and a means of intellectual stimulation.

Orchestral music is a constant companion in my daily life, accompanying me during commutes, walks, cooking and tidying. At a concert I am generally familiar with one of the works performed, so one or two works will be new to me. Platforms like Spotify and Instagram are conduits for discovering new pieces, albeit with varying degrees of success. Looking ahead, I anticipate my relationship with orchestral music to be lifelong, with attending concerts of masterworks remaining a cherished activity. Meanwhile, the broadening demographics of concert audiences and the ongoing efforts to address the lack of racial diversity within orchestras are developments I observe with interest, recognising the complex challenges they represent for the orchestral music scene."

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Photo: Andy Paradise



Photo: Ben Wright

## Group 2: Music students

Despite the many challenges to the diminishing provision of music education in schools, and reports of a recent decline in the number of students studying music in Higher Education, there are still young people studying music today, who are the future of the orchestral genre—tomorrow's ensembles, tomorrow's critics, tomorrow's composers and tomorrow's audiences.

This group (8% of the orchestral sample) comprises people studying music at college as well as those learning an instrument. Whether a vocation or a serious hobby, this was a group committed to learning about and wanting to broaden their knowledge and experience of the orchestral genre.

Beyond the central importance of core symphonic repertoire, this studious group were more demanding and exploratory in their tastes: they were those most likely (30%) to enjoy modern or contemporary composers (such as Steve Reich, Philip Glass, John Adams, Charlotte Bray or Shirley Thompson) and to say that they liked attending chamber or solo classical music recitals at a smaller, more intimate venue (15%).

There was also a close sense of connection with contemporary culture. Pop music was the genre most students said they enjoyed (42%), followed by orchestral (33%) and rock music (33%).

This also played out in the type of orchestral concerts they most enjoy – the popular culture sensibilities of a younger age group of students perhaps demonstrates that orchestral music today needs to live within the context of popular culture.

When looking at how this group fulfil their interest in performing arts outside the concert hall, listening to recorded music (33%) and classical music radio (32%) are the most frequent, along with learning and playing an orchestral instrument (30%). In terms of listening to orchestral music, music students were most likely to do this when reading or studying (24%) as well as enjoying a playlist when in the gym (25%).

### Top five orchestral concerts

- |                                    |     |
|------------------------------------|-----|
| • Hits from the musicals           | 30% |
| • Family-friendly concerts         | 28% |
| • Orchestral rock                  | 27% |
| • Traditional symphonic repertoire | 27% |
| • Video game concerts              | 26% |



### Stone Tung, third year trumpet student at the Royal College of Music

My musical tastes are primarily centred around classical music, yet I often listen to jazz as well. I tend to listen to other genres as a way of unwinding from what I have been focused on in my studies. On a day-to-day basis, I am constantly listening, whether I'm travelling to college, cooking, or drifting off to sleep.

In my view, music education should be mandatory. I grew up in Hong Kong, and music is treated totally differently to how it is here. In particular I see the benefit of teaching solfège, which doesn't really exist in the UK. In a way I do understand the Government's obsession with STEM subjects, but I don't think people realise how important music is. Just think about when we were in Covid how many people were turning to the arts. It kept us all sane. Now that we are back in normal times, we have forgotten that again. In my studies at music college, I have become increasingly aware of the challenges facing the orchestral scene, including the need to diversify repertoire and engage broader audiences. We need to invite and guide audiences through the enriching world of orchestral music on their terms, ensuring its relevance and vitality in our lives.

### Group 3: New discoverers

Around 12% of today's orchestral audience describe themselves as new to the genre, by no means expert, but enjoying discovering pieces of music. The important point to make here is this new group of supporters doesn't necessarily comprise young people—it's an adult group from wide-ranging backgrounds, who have started a journey of discovery by choice or by accident during their adult or working life. Single parents are most likely to be in this group (32%), as are people with disabilities (21%), skilled manual workers (29%) and, regionally, people from the north are most likely to be immersing themselves in the genre for the first time (26%).

Remarkably for this group – and perhaps because it is a new-found interest—orchestral music is rated in the top echelon of music genres that people like (33%), alongside pop (32%), rock (33%) and R&B (32%).

Orchestral music is also very much rooted in everyday routines with this group: the orchestral repertoire is enjoyed while commuting or driving a car (23%); when cooking (22%); as the soundtrack to reading a book (23%); whilst working (22%); or relaxing in the bath (22%).

This group's recent interest in orchestral music is nourished by people enjoying CDs/vinyl or streamed playlists (42%) and many have started listening to classical music radio (41%). In terms of online engagement, 27% of respondents said they have watched streamed concerts online, and 25% have furthered their interest in orchestral music through podcasts (25%).

When listening to recorded orchestral music, 15% of this group say they enjoy masterworks from the core symphonic repertoire. These people also enjoy less demanding entry point, with one in four saying they like pop and rock music that features an orchestra (25%), whilst others like orchestral music that relates to film, musical theatre, and/or gaming.

Such everyday access points nurture people's engagement and enrich their lives, and they do signpost people to the concert hall. The appeal of familiar or popular music in an orchestral context is the factor that draws people to attending orchestral concerts.

Top five orchestral concerts	
• Pop crossover	40%
• Musicals	36%
• Film screening with live orchestra	34%
• Film blockbusters	33%
• Family friendly concerts	30%



Photo: Chris Winter



## Sonia Alani's story of discovery

“The closest I’d ever come to seeing an orchestra playing live had been watching the BBC Proms on TV. I’d always thought of such concerts as being expensive and somewhat pretentious and dressy events. So, it was a big surprise when a friend invited me to attend my first live orchestral concert at the Royal Festival Hall, featuring the RPO celebrating Vaughan Williams’ ‘A London Symphony’, to see such a varied audience of all ages and classes, none dressed in evening wear. Memories of it will remain with me forever - the immense talent, passion, and expressiveness of the musicians and the conductor, all moving in unison whilst playing their integral part in presenting the music in celebration of the composer – a true collaboration. A spectacle to behold and a visceral experience, at times I had to hold back tears of joy or sadness.

Happily, that has not been my only orchestral concert. The anticipation and my feelings of connection and engagement with the musicians, as well as those around me, is always remarkable. The magnificent sound - huge and balanced as it envelops the entire hall, is a rich experience, and cannot compare to listening to a recording. After each concert, I am left buzzing for days, feeling less stressed and more positive about life. The concert experience has captured me, and I can’t wait to go to many more. Yes, my love of classical music has been reborn, and I am just at the beginning of an exciting journey to make up for all those years I’ve lost.”

## Group 4: Casual followers

With many music genres, one tends to think of committed followers – the term ‘music fan’ itself denotes some form of commitment, knowledge, and tribal advocacy. However, there is also the casual audience—those who have a passing interest, and this is as true of orchestral music as it is of any other music genre.

Nationally, 30% of the orchestral audience is made up of these people. They like orchestral music, although they openly admit it's not their favourite genre - they will listen to orchestral music from time to time, perhaps when they fancy something different.

This is a very important audience for the orchestral world. They are possibly as likely to go to a pop concert at the O2 Arena as they are to a BBC Prom, and they might browse various genre aisles in a music store whilst choosing their next spontaneous buy. Further, they probably flit from playlist to playlist on streaming sites before deciding what to listen to. This is the audience the orchestral world must fight for. It is an open door, but this audience will only be won over if the orchestral world understands them better and is prepared to engage with them—and on their terms.

In terms of music preferences, pop (43%), rock (35%), R&B (34%) and country (30%) generally top the list of 17 music genres surveyed, although orchestral music stands favourably with 29% of respondents. Relatively speaking, orchestral music is more popular than many other popular genres, such as musicals (27%), dance (23%), jazz (21%), rap (15%) and Latin (14%).

Enjoying recorded music (48%) and listening to music radio (42%) are the two dominant ways people in this group discover music—with the commute or journeys in the car (22%) and holiday playlists (20%) the most common.

Many in this group would consider attending a live orchestral experience. Musicals emerge as, potentially, a very influential signpost to discovering the orchestral world more fully, as do popular film soundtracks. The core repertoire is not such a popular choice here, but more popular and family-friendly options are the access points that give these people their first classical concert experiences.

### Top five orchestral concerts

- |                            |     |
|----------------------------|-----|
| • Musicals                 | 43% |
| • Pop crossover            | 40% |
| • Blockbuster films        | 37% |
| • Family-friendly concerts | 34% |
| • TV soundtracks           | 31% |



## John Vincent, Digital Marketer

“As someone with a deep-rooted love for rock or dance music, I never imagined orchestral music would weave its way into my playlist. There was a film studies module at university I took which was the first time, I suppose, that my perspective was shifted a little. In a way, this planted a seed of appreciation for a genre that I had previously overlooked. Over time this has developed. Most of the music I listen to isn’t classical music, but from time to time when I need a bit of a serene escape I will switch to something classical. Streaming platforms are good at making suggestions when I’m in one of those kinds of moods.

I went to a live performance of film scores about a year ago for the first time and was fairly blown away. There was something incredibly special about the visceral impact of live orchestral music shared with an audience equally captivated by the nostalgia and grandeur. This is certainly something I would like to do again, and has made me more open minded about trying other sorts of concerts in the future.”

## Group 5: First-time joiners

Beyond those people starting their journey with the orchestral world, 12% of the orchestral audience described themselves as knowing very little about the genre but being interested in trying it—perhaps for the first time in 2024.

Significantly, given the initiatives underway to improve inclusion and diversity in the orchestral world, the research suggests the progress made with this audience would do much to improve the make-up of tomorrow’s orchestral audience. Parents of young children aged under five (32%), and those from global majority groups (21%) were most likely to be in this audience group.

For this group, pop music was most popular (43%), although orchestral music ranked 7th of 16 music genres surveyed. The orchestral music that this group would most likely be drawn to was music that related to film, musical theatre and/or gaming (33%).

Music radio was again an important signpost for orchestral music (41%), as were informative TV programmes on orchestral music (26%). Social media was also a big influencer, with people saying that following artists on social channels (18%) and interesting podcasts (16%) would support their orchestral discovery.

Orchestral concerts were a consideration for people in this group, although the important finding here was the need for accessible music.

Top five orchestral concerts	
• Musicals	43%
• Pop crossover	40%
• Blockbuster films	37%
• Family-friendly concerts	34%
• TV soundtracks	31%

## Eric Duvet’s story of discovery

“As an ex-musician turned music photographer with over a decade of experience, I’ve encountered numerous legendary rock stars and promising new bands. Yet, nothing prepared me for the awe-inspiring experience of witnessing an orchestra perform live. I could not believe how so many musicians could play in unison when I know how hard it is in pop and rock for a trio to play together. The passion in the way everyone was playing their instruments was as though they were possessed by the music, as if nothing else mattered. You could see that this was not an act like many of the young bands nowadays, but some real musicians feeling the piece of music and the instruments they were playing and not trying to act any part or sell you something.

Watching the conductor was a spectacle in itself, translating the musical score into dynamic body language, guiding the orchestra with nuanced movements. The full experience of a live orchestra reminded me of the old rock bands live when they were playing with their passion as artists and not as though business, rather than music, as their main driving force.”



## Assessment

### Louise Williams, Head of Sales and Marketing at the Royal Philharmonic Orchestra comments:

“Today’s orchestral audience is wide-ranging. In the past, we have looked at how to target specific economic or social groups but, as our research makes clear, these groups are already represented in the RPO’s audience.

An attitudinal study, based on where people are with their orchestral journey is far more meaningful because it better helps us to understand what we and other orchestras and venues need to do to become positive catalysts to support people’s music journeys.

In the past, some have criticised the RPO for the breadth of our programming beyond just the symphonic masterworks. But that misses the point entirely. As this new research makes abundantly clear, different audiences want different things. New audiences in particular need familiar access points, concerts they can bring their family to, concerts where they are at ease with some of the music being played. These audiences—if supported properly—will start musical journeys that will lead to the Beethoven and Mahler symphonies. The more people engage, the more they will want to discover. And as our research makes clear, once people have mastered the most demanding repertoire, they too look forward to one of our Abba nights, or a night of captivating music from the musicals.

Our data suggests the audience for live orchestral performance has grown over the last five years, which is most welcome news. But to service this growth, ensembles will have to adapt and offer a greater breadth of programming that is accessible, enriching, and joyous to more diverse and new audiences.

We have taken this approach at the RPO for some years now and have found the more creative entry points we offer, the more people will start journeys of discovery and move on to experience core symphonic repertoire. A noteworthy finding from our latest research is that between 10-20% of all respondents said they would look to experience traditional repertoire as part of a broader concert mix. Our task as an orchestra is not to prescribe what people should listen to, rather to nurture a journey of discovery – and that’s exactly what the RPO is aiming to achieve through its varied programming.”

## Chapter 3

### Orchestral music in 2024 and beyond: Embracing change in the digital age

There’s not much in today’s world that hasn’t been affected by technology, and perhaps there’s no better example than the way technology has changed our engagement with music in recent years.

Even pre-pandemic, the world was quickly shifting to a ‘post-ownership economy’<sup>1</sup>, where people ‘use’ cars, clothes, furniture, and so on rather than own them. Streaming services like Spotify and Apple Music, coupled with widespread smartphone use, and new social media in the early 2010s, revolutionised the way people listened to and engaged with music.

The Covid pandemic then super-charged these trends. Last year, PwC reported that digital music streaming subscription revenues are forecast to rise from US\$36.1bn in 2021 to US\$45.8bn in 2026<sup>2</sup>. Specifically for the performing arts, a 2022 UK Parliament report highlighted the pandemic’s role in the increase of audience engagement online<sup>3</sup>. Meanwhile, a 2023 DCMS survey<sup>4</sup> pointed directly to technology playing an increasingly important role in the way people engage with the arts. It highlighted growing numbers of UK adults who now regularly listened to music online (55%), watched pre-recorded music or dance events online (16%), or pre-recorded theatre, visual arts, or literature events (7%).

So far, this report has explored change and evolution as driven by the audience. For this final chapter, we share new 2024 research which assesses how the orchestral world must adapt to advances in technology. Specifically, we look at the ways technology is shaping people’s musical appetites and horizons. We assess the ways in which people are relying on technology to discover new music, and the effects this is having now on the music people engage with. We also explore how people feel technology sits with the live concert experience of the future, try to get a sense of the possible scenarios that people would be prepared to accept as ‘normal’, and the timeframe in which they might take place.

Through all this, we examine people’s willingness or resistance to change—although the option to embrace change is not really an option at all. The genie is already out of the bottle.

#### i) Music streaming – positive or negative impacts?

During a tidal wave of technology that has significantly transformed our digital landscape in the last 15 years, we started by looking at how streaming has changed

<sup>1</sup> Belk, R. (2014). You are what you can access: Sharing and collaborative consumption online. *Journal of Business Research*, 67: 1595-1600.

<sup>2</sup> Global Telecom and Entertainment & Media Outlook 2023–2027, PwC (2022)

<sup>3</sup> UK Parliament POSTNOTE 669 May 2022: The impact of digital technology on arts and culture in the UK

<sup>4</sup> Participation Survey, January–March 2023.

people's engagement with music. Overall, around two thirds of adults (64%) said that their engagement with music had changed in some way since 2010. This was most pronounced among younger people (85% of 25-35s), dropping to 31% of people aged over 65.

Among those who said their engagement had changed, 25% of people said they are now listening to a broader variety of styles. Additionally, 22% of people said they had discovered music they would never have heard otherwise.

Among the less positive responses, one in seven admitted that their music listening has become more passive—they play music without really listening to it. The same proportion said they miss the experience of browsing and buying physical music.

Whilst some saw positive and negative impacts of music streaming, overall, the responses leaned slightly more towards positive impacts—but only just. Nationally, 69% of adults cited streaming sites as having a positive impact on their listening habits, compared to 66% who mentioned negative aspects.

Table 7: Impact of Streaming on Musical Engagement Since 2010s: (Source: people whose habits had changed)

<b>NET POSITIVE FACTORS</b>	<b>69%</b>
I find I'm listening to a BROADER VARIETY of music styles/genres	25%
I discovered things I never would have heard otherwise	22%
The ease of access to music has made me more spontaneous in my listening choices	20%
I spend MORE time researching the artists/similar music	13%
I spend MORE time talking about music with friends and family	13%
I am more focused on songs/excerpts than on the artists in the moment	9%
It has led to me buying MORE tickets to live events	9%
I have become more involved in online music communities or forums	8%
<b>NET NEGATIVE FACTORS</b>	<b>66%</b>
My music listening is more passive, I often play music without really focusing on it	14%
I miss the experience of physically browsing and buying music (like CDs or vinyl)	14%
I feel overwhelmed by the sheer volume of music choices available	13%
I find myself less loyal to specific artists or bands	11%
I spend LESS time researching the artists/similar music	11%
It has led to me buying FEWER tickets to live events	9%
I spend LESS time talking about music with friends and family	9%
I have a shorter attention span	9%
I find I'm listening to a NARROWER RANGE of music styles/genres	8%
I don't think for myself anymore - I'm more reliant on AI recommendations	5%

There were some stark differences by location. Again, looking among those who said their habits had changed, people who lived in rural communities were far more likely to point to the benefits of technology on their musical engagement (73%), noting increased variety in their listening and more spontaneous listening habits. In contrast, the reverse was true for city dwellers. Here, 74% of respondents pointed to the negative impacts of music streaming sites, with people less inclined to research artists and music (15%) or remain loyal to specific artists and bands.

The research also looked at the formats by which people prefer to consume recorded music: physical (CDs and vinyl), paid-for downloads, and streaming. Interestingly, among those who used physical formats (17% of UK adults), nearly half (46%) saw no change in engagement. Among those who did, a significant 76% highlighted negative aspects, far exceeding the positives, mainly missing the experience of physically browsing and buying music.

Moreover, people who described themselves as 'core' classical music fans inclined more towards the negatives (78% vs 65% positive) describing feeling overwhelmed by the sheer volume of music choices (19%) and mentioning that that they now listen to a narrower range of music genres (14%).

## ii) Algorithms vs human choice

Personalised algorithms have become a fixed feature of the world of music playlists, helping people to gain more from the vast, easily accessible libraries of music now available. Inevitably, these innovations come with a new set of consequences for how music is consumed. Building on previous research about listening habits, we wanted to assess the impact of algorithms on people's decision-making, determining whether they still value this process, and identifying the situations where it is most important to them.

The results showed that nearly everyone (but interestingly not quite everyone), can point to at least one situation where they would insist on choosing the music themselves, rather than having an algorithm select it for them. A small group, 13%, said they would be quite happy for an algorithm to select the music for them in any situation they might listen to music.

Perhaps most surprisingly, younger people were the most hostile to algorithms. Nationally, just 6% of people aged under 25 said they would always delegate the music choices to whatever an algorithm suggested (compared with 13% of over 55s). Also, for orchestral music enthusiasts, particularly those who enjoy more niche chamber music, only 1% were comfortable with an algorithm choosing their music at any given time.

People tended to insist on choosing the music during times when they had a moment to themselves. Among those who insisted on choosing themselves, the most common situation was while driving, with 44% preferring to select their own music. This was followed by choices made while cooking (32%), and during relaxation or before sleep (30%). At the other end of the scale, people seem to be less bothered about the music they played at the gym (23%), or the music played at a dinner party or social gathering (21%).

Table 8: Situations where it is important for people that THEY choose the music, rather than leave it to an algorithm (NB - Excluding people who are happy for the algorithm to choose for them in any situation)

The music you listen to while driving	44%
The music you listen to while cooking	32%
The music you listen to when relaxing/going to sleep	30%
The music you listen to while working/studying	28%
The music you listen to while commuting	28%
The music you listen to at specific times of the year like Christmas or Halloween	26%
The music you listen to for therapy, relaxation, or meditation sessions	24%
The music you work out to in a gym	23%
The music you listen to at a dinner party/social gathering	21%
The music you play during children's activities or playtime	11%

### iii) Channels for music discovery

The research also looked at the influence of technology on how people discovered new music over the last 10 years, and what sources have become more important during this time.

Once again, the majority (83%) could point to at least one source online they now use to discover new music, but this varied significantly by age.

Among those who relied on technology, the predominant sources for discovering music were online videos and live streams such as YouTube (40%), music streaming recommendations (34%), and social media platforms (34%). These trends were relatively consistent across all age groups.

Looking at younger people, the vast majority of whom rely on tech, the proportion of young people engaging with cutting-edge forms of media such as augmented reality and in-game virtual reality music experiences was by no means insignificant at 9%. Although not yet mainstream, it is worth bearing in mind that the first in-game concert—DJ Marshmello's Fortnite concert—took place a mere 5 years ago in 2019<sup>1</sup>. Since then, we've seen similar performances on these types of platforms

<sup>1</sup> Guardian: [Marshmello makes history with first ever Fortnite in-game concert](#)

Table 9: Proportion of adults who said technology has had an impact in terms of discovering new music

25-34	97%
35-44	92%
45-54	87%
55-64	75%
Over 65	54%

from Eminem, Ariana Grande, and Travis Scott, as well as a weekend-long festival<sup>1</sup>. Travis Scott's 2020 concert was attended by 27.7 million unique users and 12.3 million concurrent access players. The archived YouTube video has been viewed over 240 million times at the time of writing.

More broadly, among all people who relied on technology to discover new music there was a continuation of live concert streaming during the pandemic, 16% of people continue to stream live sets online, while online concerts and Q&As with artists featured prominently among the responses (11% and 9% respectively). Again, given the small but substantial proportion of people who say this forms a part of how they discover new music, this data suggests an appetite for digital music experiences is likely to persist.

For core classical music fans, three quarters (74%) could point to areas where technology has had an impact on their music discovery. Of those that had, over half (51%) relied on online videos and live streams, while a third noted the importance of social media platforms. This group was also more likely than most to use music discovery apps such as Shazam (20%).

Table 10: Digital sources people rely on to discover new music (Source: people who say technology has had an impact on the way they discover music)

Online videos and live streams (e.g., YouTube)	40%
Music streaming service recommendations (e.g., Spotify playlists, Apple Music curations)	34%
Social media platforms (e.g., Instagram, TikTok, Facebook)	34%
Internet radio stations and online radio shows	20%
Streamed live sets via the internet	16%
Social media fan groups	14%
Podcasts about music or featuring music	14%
Music discovery apps (e.g., Shazam, SoundHound)	14%
Artist or band websites and newsletters	11%
Virtual concerts and live streams	11%
Music forums and online communities	9%
Artist live sets and / or Q&As on social media (e.g., Facebook Live)	9%
Music blogs and online music review sites	9%
Augmented reality (AR) or virtual reality (VR) music experiences	6%
Fundraising membership groups (e.g., Patreon)	6%
Other	1%

<sup>1</sup> Mirror: [Fortnite Festival: release date, artists, songs, gameplay and everything we know](#)



Photo: Richard Ion

#### iv) Beyond digital: alternative music discovery sources

While people are increasingly reliant on digital channels to discover and engage with new music, other formats have also risen in importance. When respondents were asked about the sources they turn to, beyond technology, that have become more important in the last 10 years, only 7% said that they exclusively rely on digital formats to discover new music.

Live music events were among the top three sources that people turned to (21%), ranking just slightly behind radio (25%) and film and TV soundtracks (23%). For younger people, live events were the top choice (28%).

The number of sources people relied on varied significantly by age, with younger individuals typically relying on twice as many sources as older people.

Indeed, musical tastes were shaped by a range of diverse influences.

- Parents with children under 11 noted their children's tastes having a big impact on their own (23%).
- In the Black/African/Caribbean/Black British communities, 23% acknowledge their church as a key influence.
- For Londoners, international travel plays a major role in discovering new music (15%).
- Classical audiences were the least likely to say they completely relied on technology for discovering new music (1%), and more likely to rely on live music events (23%), mailing lists (21%), and personal recommendations and word-of-mouth (24%).

Table 11: Other sources people rely on to discover new music

Radio	25%
Film/TV soundtracks	23%
Live music events - concerts, gigs, etc	21%
Personal recommendations / word of mouth	14%
Cafes and restaurants	10%
My kids' interests in music	10%
Computer/video games	10%
Travelling to other countries	9%
Record stores	7%
Being part of a fan group /music club	6%
Public performances and parades	6%
Newspaper articles, profiles and reviews	6%
Church or religious services	5%
Performing arts venues - brochures/flyers	4%
Bookstores	4%
Buskers	4%
Community choirs	4%
Subscription to a music magazine	3%
Other	2%
N/A - I rely completely on technology for discovering new music	7%

#### v) The digital concert hall of 2034

Aside from innovations that have affected the different ways in which we listen to music as part of our daily lives, innovations are also transforming the possibilities of the modern live experience. In the last couple of years we've seen virtual performances ranging from ABBA's 'Voyage' and Kiss's 'Immortal Avatars' to the RPO's performances with Maria Callas' and Roy Orbison's holograms, accompanied by live musicians. The use of phones and wearable tech during a performance has the potential to transform the live performance experience, particularly for those people with disabilities, while other technologies have the potential to push existing elements to new extremes.

Even for a more conservative art form like orchestral music, 60% of orchestral enthusiasts can envisage a completely different concert experience on stage within the next 10 years.



Of those that do, a third (32%) anticipate concerts conducted by holograms of historic conductors and musicians. Additionally, 28% foresee the advent of multi-sensory concert halls, where lighting, temperature, and scents dynamically react to the music. Another 27% predict a massive expansion in virtual reality concerts.

Reflecting the impact of lockdown, a quarter (25%) envision a remote orchestra, with musicians from around the world playing together in real-time.

A good example of the blurred lines between science-fiction and reality is that only a small fraction, just 8%, can imagine interactive digital programme notes being a part of this future. (The RPO pioneered such programme notes in 2019).

Interestingly, classical music fans were more likely than most to foresee changes in the future, with 70% anticipating shifts, especially those fond of contemporary and modern music (94%). Among those expecting change, 32% envision holograms of historic conductors, 34% anticipate virtual reality experiences, and 33% foresee established remote orchestras.

Table 12: Anticipated developments in live orchestral concerts over the next decade

Concerts featuring holograms of historic conductors and musicians.	19%
Multi-sensory concert hall experiences: lighting, temperature, or scents that react to the music.	17%
Immersive virtual reality experiences: VR could allow audiences to experience classical concerts from the perspective of the conductor or musicians.	16%
Established remote orchestras: musicians from around the world playing together in real-time through high-speed internet connections.	15%
Enhancements for deaf audiences - visualisations of the music, etc.	13%
Autonomous drones for light and stage effects.	13%
Personalised audio streams for audiences: individual audience members could choose specific audio mixes (like highlighting certain instruments).	11%
Musicians playing on 3D printed instruments.	11%
Automatic instrument tuning: real-time, AI-assisted tuning of instruments during performances.	10%
Concerts in extreme environments: performances in unique environments like underwater or in extreme natural settings.	9%
Audience-controlled interactive elements during the performance (e.g., choosing the next piece or influencing the lighting).	8%
Interactive digital programme notes.	8%
Concerts in space.	5%
Other	1%
N/A - there won't be any changes to how it is now.	40%

## Assessment

### Huw Davies, Deputy Managing Director of the Royal Philharmonic Orchestra commented:

“Developments in technology in the last 20 years have meant we are now living through a period where people’s access points to music have changed. This is already having seismic consequences for the industry, and with a tech-savvy generation coming through with huge expectations, these changes will only get bigger. The convenience and personalisation offered by these innovations have undeniably transformed how we access and discover music—although it is not an isolated force, but rather a catalyst that works in tandem with traditional music experiences. The impact of technology on the music industry is not a case of either/or but rather a harmonious integration that is continually evolving.

The record audience figures we experienced in 2023 is one sign of this. The advent of new technologies where you can experience music from home, or while travelling, or wherever else, have helped not hindered live performance ticket sales. Technology, used in the right way, has the potential to broaden the audience, deepen people’s engagement with music, enhance the experience, and make music more accessible, particularly for people with impairments. The challenge for the industry is to harness these technological advancements in a way that respects and enhances the artistic integrity of the music, whilst meeting the ever-growing expectations of the audience.”



Photo: Richard Ion



Photo: Andy Paradise

## Conclusion

### James Williams, Managing Director of the Royal Philharmonic Orchestra

The Royal Philharmonic Orchestra aims to place orchestral music at the heart of contemporary society – and this can only be done by listening. To this end, our annual research helps us to stay fully engaged with, and responsive to, the expectations of today's expanding orchestral audience.

Our audience lies at the heart of everything we do. Having an insight into how people engage with the music they love, understanding what they listen to and want to discover is critical. As our data makes clear, the orchestral audience is growing and diversifying. Today's orchestral audience is more diverse than ever, spanning all ages, backgrounds, and regions of the UK, and we remain committed to making orchestral music accessible to everyone.

Beyond audience profiles, there is also far greater diversity in the various ways people engage with orchestral music during their everyday lives. People choose to listen to orchestral music while exercising, working, cooking—and even during personal wellness routines—and this signals a deeper integration of orchestral music with the personal spaces of individuals. The change in consumption habits reflects the evolving relationship between the audience and music, transcending the confines of concert halls into the realm of everyday life. This does not represent any form of dilution or a move away from the concert hall. In fact, the more people that start journeys of orchestral discovery outside the hall, the more people will attend a concert.

As the audience make up and listening habits broaden, so the role of technology becomes more interesting to understand and embrace. Without doubt, the rapid technological change that has occurred in the last decade is having a monumental impact on music. The acceleration of innovation presents both opportunities and risks, with the potential to fundamentally alter how audiences engage with the orchestral world.

Turning our back on this as an organisation is simply not an option. There is a need to evolve tradition with technology but, at its core, this must be guided by the music and its power to connect with the human spirit. We need to ensure that the technology enhances rather than overshadows the musical experience. The challenge, then, is to discern between fleeting gimmicks and genuine innovations that enrich the

artistic expression and accessibility of orchestral music. The RPO was the first orchestra to trial digital programmes in our concerts and perform with holograms of legendary singers. Similarly, we are collaborating with some of the world's leading tech companies to develop new forms of concerts and performances. It is this curiosity and innovation that will drive us to continue exploring new avenues for the orchestral art form.

With the interplay between tradition and modernity playing out at every level - in terms of audience profiles, music habits and people's use of technology - the Royal Philharmonic Orchestra embraces change. The most important element for us is the journey. Our over-riding objective to ensure orchestral music can be accessed and enjoyed by the broadest possible audience redoubles our commitment to provide people with the greatest number of entry points to the genre – and to fully understand the pathway that helps people of wildly contrasting backgrounds share an enriching journey of musical discovery. Through our community and education work, as well as the breadth of our concert programming, we are already making good progress, and we hope this research report will inspire others to embrace the necessary changes to ensure that great orchestral music can be joyful and enriching for all.



Photo: Ben Wright

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