

Where We Stand

The Classical Music World Today (revised, 2012)

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(first published on my blog, revised each year, and assigned to my Juilliard and Eastman classes on the future of classical music)

I think we all know that classical music is having a crisis. This is the 16th year that I've taught this course, and I was asked to teach it because I'd given a lecture here the year before, on the classical music crisis. So talk of the crisis is now entering its 17th year.

What's the crisis about? There are many ways to look at it. Classical music institutions are in trouble. They're selling fewer tickets, raising less money, running deficits. But at bottom there's a fear that classical music, as time goes by, plays a smaller and smaller role in our culture. That its audience is aging. And that, in the future, things may get so bad that classical music might simply disappear.

I don't think that will happen. I think it's far more likely that classical music will adapt and change, and be reborn as an active part of contemporary life. The changes, of course, might be gigantic, and, perhaps, upsetting to people who love classical music just as it is -- the focus on old, beloved masterworks, the formality of concerts, the whole familiar picture,

But what's interesting is that the changes have already begun. Which means we can look at them, see which ones work and which ones we like. We can try to encourage the change that seems healthy. Which might lead to -- has already led to! -- a lot of debate. But the debate itself is healthy. And there's no reason that classical music, in the future, should work just one way. We might, for instance, see formal concerts coexist with wildly informal ones, even at our top classical music institutions, like Carnegie Hall and the New York Philharmonic.

One thing we do know: In the past few years, the crisis has grown more intense. The Philadelphia Orchestra, as most of us are aware, has said that it will declare bankruptcy. That announcement seemed to many people like a tipping point -- a moment when, all at once, we all see that the decline of classical music (at least as we know it today) can't be reversed.

And Philadelphia isn't alone. Some smaller orchestras -- New Mexico, Syracuse -- have gone out of business. Others, like the Columbus (Ohio) Symphony, the Detroit Symphony, and, believe it or not (though this wasn't discussed publicly), the Cleveland Orchestra, had near-death experiences. Columbus survived by cutting back, on, among other things, the salaries of its musicians, which now are a fraction of what they used to be. Cleveland survived by relocating, for part of each year, to Miami, and raising money there.

As you'll see from your reading, other classical music institutions -- the San Francisco Opera and the Colorado Symphony -- have publicly said that they, too, are in crisis, and have to restructure themselves in very large ways. This is truly an interesting -- and a wild -- time for classical music. But how did we get there?

How things used to be

Go back to the 1950s or before, and you'll see a classical music world very different from the one we know now. As you'll see from your other reading, back in the 1920s a soprano at the Met had teenage fans, who'd come to her performances and scream. Mystery novels from the 1950s might have detectives who turn on the radio and listen to Brahms. A film about Jascha Heifetz, made in the '50s, shows him playing a surprise concert on a college campus. Students are sitting around on a lawn, and when they heard that Heifetz is playing, they all get up and run inside to hear him.

TV networks broadcast classical music in the '50s. Classical records sold many more copies than they sell now, even though the population was quite a bit smaller. And in 1962, again as you'll see from your reading, one of the top magazines in America commissioned a piano piece from Aaron Copland, and printed it for pianists to play. Would that happen today?

And it follows from all of this that the classical music audience was younger than it is now. How could it not have been, with all those teenage fans? Would *Life* magazine have printed a Copland piece, just for its readers over 60?

This surprises many people. We see an older audience now, so we assume the audience always was old. I've even seen people make a virtue of that, and say the classical music audience *has* to be old, because classical music -- by its very nature -- requires maturity and sophistication. (Which would mean, I guess, that all of you are extremely advanced for your age!)

But in fact every study I've seen from the past shows a young audience, no older, in fact, than the population at large, with a median age (at least before the 1960s) not much over 30. This includes studies done in Minneapolis in 1955, and in Los Angeles and Grand Rapids, MI in 1937. In Minneapolis, half the audience for symphony concerts was under 35. Plus there's a large 1966 study, which shows an audience with a median age of 38 for all forms of the performing arts, classical music included

The aging audience

Starting in the 1960s, the classical music audience started to get older. Studies from the '70s show it aging. In 1982, the National Endowment for the Arts began studying the classical music audience, and has shown it aging from then until now. The median age now for everyone who goes to classical performances of any kind is 49. And at large classical music institutions, the audience is surely older. When Peter Gelb took over the Met, he said the median age of their subscribers was -- wait for it -- 65. Listeners to WQXR, the classical radio station in New York, had, a few years ago, a median age as high as 73.

What does this mean? It means that, as each new generation steps up to the plate, fewer and fewer of them are interested in classical music. Of course, some younger people do study classical music. You yourselves are proof of that. But if you have friends outside the classical world, you know what I'm saying is true. Classical music just isn't on their horizon.

The age of the classical audience shows who's in it -- people, for the most part, who grew up in the old-time era, when classical music was much more popular. And that, today, increasingly means people 65

and above. In 2008, the National Endowment for the Arts released a study, which showed that the percentage of adult Americans who go to classical music performances has declined nearly 30% since 1982 (the year when the NEA started tracking this data).

That decline began slowly, in the 1980s, when the percentage of people in the classical music audience who were under 30 simply collapsed. Fell in half. As time went on, the decline spread to older age groups, until, in 2008, the only age group that still went to classical performances as much as it used to was made up of people 65 and above. Which means, as I've said, people (like myself) who grew up when classical music was more popular, when it was taught widely in schools, when the audience was younger than it is now.

Where does this lead? Clearly, toward darkness. If nothing changes, the classical audience -- at least as we know it -- surely will shrink, no doubt by a lot.

Culture change

Why did the audience age? The reason is simple, or at least I think so. Our culture changed, especially in the 1960s. And classical music didn't keep up.

Here's one way to look at it. Find a photo of the crowd at a baseball game in the 1940s. You'll see men in suits and ties, wearing hats. Now go to a game today. You'll see men and women, people of all ages, dressed (to put it mildly) informally. I'm not going to say that classical concerts haven't gotten more informal — certainly you see more people dressed casually in the audience — but orchestra musicians still wear formal dress, and the formal atmosphere of performances (the entrance of the concertmaster, followed a little later by the conductor) has barely changed. The rest of the world has evolved; classical music has only just started to. Younger people, for this reason, have found classical concerts less and less plausible. They just don't look or feel like the rest of the world. (And when they grow older, they don't change their mind about that.)

To some people, of course that's a virtue — classical music can seem like a refuge to everything unpleasant about modern life. But in practical terms, it's a disaster. More people are driven away from classical performances than are attracted to them, because — as ought to be obvious — the people in our world who participate in contemporary culture outnumber those who seek an escape from it. That's especially true of younger people.

And even artistically, the idea of classical music as a refuge is questionable. If classical music is cut off from bad things in modern life, it's also cut off from the good things we experience, and loses whatever roots it ever had in the way most of us live. In past centuries, this wasn't true. Classical music of course was a contemporary art, reflecting whatever was going on in the world. It can't pretend to be that now.

And there's another change I've seen in my lifetime -- the rise of popular culture, and especially the rise of new forms of musical art, inside the pop music world. When I was growing up, in the 1950s, most people believed that classical music was the only legitimate art music. Even then, that idea was dubious, because it left out jazz, which (with the rise of bebop, in the 1940s, with musicians like Charlie Parker)

had moved far beyond mass entertainment. If bebop were painting, it would be modern art – abstract, jangly, not meant to be popular. Older jazz was meant for entertainment – though even so, jazz musicians like Duke Ellington and Louis Armstrong had every right to be ranked as serious artists, no matter how successfully they entertained their audiences. In past centuries, classical music, too, was entertainment. How else did Haydn make a living, if not by entertaining the guests at Prince Esterhazy's summer palace?

Back to pop music. In the '60s, with people like Bob Dylan emerging, pop music changed. New pop music styles emerged that weren't even popular. Bands (like the Velvet Underground) became famous without selling many records. These bands were artistic, and influential, but their audience was, in effect, an art audience – connoisseurs with very special taste. Classical music now had even more competition, and the competition was more lively, more vital, and more rooted in modern life than classical music knew how to be. That became even more true in the past couple of decades, when alternative pop in many forms began to explode, and some artists – Björk, for instance, whose music can sound like contemporary classical compositions – could be both artistic and popular.

I'm not going to outline every major aspect of this large-scale culture change, whose effects — even though we take them very much for granted today — are profound. They've even spread to the other high arts, to painting, poetry, theater, dance. Suddenly classical music starts to look very old-fashioned. People today don't want to sit passively while they're fed art that they're told is superior. They want to participate. They want to make their own art, and in the wide and increasingly serious world of popular culture, they can do exactly that. Classical music — with all its rules, and all its assumptions of superiority, plus all the traditional idea that people need special education to appreciate it — can seem stuffy, out of date, and even (to many people) pointless. People don't mind classical music (in fact, they're downloading it quite a bit), but the structure and ambience of classical performances now doesn't seem to make sense.

Numbers

So now, I think, we can start to understand why classical music's numbers have been declining. If classical music has grown distant from our culture, if – as time goes on – the people devoted to it (as an audience) grow older and older, then why is a surprise that, just for instance, there are many fewer classical music radio stations than there used to be? Or that there's less media coverage of classical music? Or that classical record labels release fewer recordings? These labels, in fact, have to release crossover records (hybrids of pop and classical) in order to survive. There are many small classical labels (more, in fact, than there were in past decades), but most of these operate as nonprofit entities, and often require the musicians they record to pay the costs of recording.

Hard data on other things can be hard to find — you have to ask around, assemble sketchy press reports, and nose out things that haven't been publicized (or are quite literally kept secret). And in fact it's a big failing of the classical music business that we don't keep accurate statistics. Or, in some cases, any statistics at all. If you want to know how the American auto industry is doing, you can easily find out how many cars Ford, Chrysler, and GM sell, not just now but year by year, for decades into the past.

Information like that just isn't available for classical music, despite all the talk of a crisis (which you'd think would make people eager to know what the facts really are).

But I hear from managers that there are fewer bookings for classical artists. One European manager I talked to in Amsterdam last year reported something devastating. He said – and I've heard this from American managers, too – that his top-level artists were being forced to accept B-level bookings, that B-level artists had to play C-level gigs, and so on down the line. But the new thing he told me was that artists on the bottom of the scale – including, of course, younger ones, who are just starting out – were now forced to play concerts where they weren't even paid a fee, but instead were given a share of the ticket receipts. (Which might mean hardly anything at all.)

Some major classical music institutions are putting on fewer performances than they used to, sometimes quite a bit fewer. Carnegie Hall is presenting 10 to 15 percent fewer events, and the Miller Theater, at Columbia University, has cut its schedule nearly in half.

And ticket sales have been falling, apparently for quite a while. (With a bump upward over the past couple of years; more on that later.) More than a year ago, the League of American Orchestras (formerly the American Symphony Orchestra League) made public a steady drop in attendance at orchestra events, beginning in the mid-1990s. Private statistics from our largest orchestras show a long-term fall in ticket sales beginning around 1990, a drop so large, cumulatively, that it may have created deficits in orchestras' budgets.

For opera companies I don't have comparable data. But Peter Gelb, who took over the Metropolitan Opera a year ago, publicly acknowledged a serious drop in ticket sales before he came on board. And the Chicago Lyric Opera, which used to sell more than 100% of its seats (subscribers would return tickets they couldn't use, and the company would resell them), was down, last I heard, to around 92%. The Met, which used to sell around 92% of its tickets, fell far below that before Peter Gelb took over.

Nobody seems to gather overall numbers for chamber music, but in recent years I've heard anecdotal accounts — a couple of dozen by now, I'd guess — from chamber music presenters about their decline. A couple of years ago I got more precise numbers from one of these presenters, located in a large American city (not New York). Each year for a decade, I was told, this group had lost 10 to 20 subscribers. Which doesn't sound like much until you do the math. The group at the time I got this information had around 700 subscribers, so if we assume an average drop each year of 15, that means that in 10 years the subscription sales had fallen 18%, from 850 to 700. That's a big drop, which certainly leaves the group worrying about its long-term future.

But the scariest piece of information is surely the stat I quoted from the National Endowment for the Arts – that the percentage of adult Americans who go to classical music performances has declined nearly 30% since 1982.

After the NEA released that data, the League of American Orchestras then did its own study, and found that the NEA numbers were correct. The League also came to a radical conclusion, which they very bravely stated in public (even though some of their member orchestras – some of the large ones –

initially didn't want this to be said). They concluded that the orchestra audience now is both aging and shrinking, and that in the future it won't be replaced. Or, rather, that it won't be replaced unless orchestras make some major changes in the ways that they operate. At the League's annual conference last June, Jesse Rosen, the League's president, made a dramatic keynote speech, in which he said all this, and more. Many people in the orchestra world had been saying these things in private, but now the League was saying them publicly. This might have been as much a tipping point as the Philadelphia Orchestra bankruptcy.

It's well known, of course, that the percentage of people who do all kinds of things has been declining. Fewer people go to the movies, fewer people go to sports events. And the decline in the number of people buying tickets for things in the arts – concerts, plays, museum shows – is actually smaller than some of the declines in popular culture.

So does that mean the arts – including classical music – are still, at least comparatively, in good shape? Not really. First, we should consider the difference between people who go to something less often, and people who stop going entirely. If we look at movies and sports events, people are going less often. And, we should note, they're still participating. They're still streaming movies, and watching sports on TV. And talking, vociferously -- in private, in newspapers, on TV, on Facebook, on Twitter, you name it – about movies and sports. And of course pop music, in which the same trends can be tracked.

But if we look at classical music, we can't pretend that people are streaming or downloading it in gigantic numbers, or that they're talking about it, or that the media is full of comments about it. And the NEA and League statistics show that many people simply have stopped going. That's much more serious than going less often. If people go less often, that's a change in the cultural weather, easily explained, because there are more things to go to, and more things (playing videogames, watching DVDs) to do at home. But if people stop going to something, that's cultural climate change – global warming in cultural form. It suggests that some large cultural shift is taking place, one that isn't likely to reverse. (A study in Norway was just released, showing a large decline just in the last 10 years, in the number of young people who care about any of the formal high arts. No one doubts that the numbers would look the same just about anywhere.)

And in fact the League data corroborates this. Some orchestras, revving up their marketing to fight declining ticket sales, have pushed their numbers up in recent years. That's the bump I was talking about. The increase hasn't been enough to wipe out the longer-term decline, but still it's notable. The League, however, found that these increased ticket sales came largely from the existing audience. Worse still, that audience was shrinking! Fewer people were buying concert tickets. So it's a good news/bad news story. The good news is that some big orchestras have gotten people in their existing audience to go to concerts more often. But the bad news is that they haven't attracted a new audience, and that their old audience is getting smaller. So the boost from some people in it going more often may soon enough be wiped out by continued shrinkage – especially since, if we trust the NEA data, the most loyal ticket-buyers are the oldest ones.

Why don't people notice?

Why don't more people notice the declines I've just described? Partly because the data is hard to uncover. Some of it is kept private, because large institutions don't want to frighten their donors. The press, meanwhile, doesn't ask tough enough questions. If an institution reports a rise in ticket sales, classical music writers don't normally ask which concerts the data is for, or how it compares with data for the past decade. Are we seeing a continued rise in sales over many years, or what might be a temporary blip, a brief upturn in the midst of a decline?

It's also hard to measure a long-term decline simply by going to concerts and looking to see how many seats are empty. "I go to the X Symphony a lot," a student said to me two years ago, naming one of America's foremost orchestras. "And the houses look full to me." A well-known critic wrote the same thing a year or so before that. Concert halls, he said, look "pretty full."

But "pretty full" is a relative term. If the X Symphony sold 95% of its tickets 15 years ago and sells 85% now, of course they're feeling that decline on their bottom line. But someone looking around a concert hall that's 85% full can honestly say that they don't see many empty seats.

Funding

This can be a long discussion, and I won't try to go into much detail here. But classical music institutions have — in recent years — often run deficits. Some of these are persistent. (They vary, of course, from institution to institution.) One reason for the deficits might be the decline in ticket sales. But another is ongoing trouble raising funds. People simply aren't as interested in classical music as they used to be.) Foundations, in particular, from everything I've heard, are losing interest in classical music. One prominent person in the orchestra field said outright, in a conversation I was part of, that at a gathering of foundations hardly anyone would even attend a meeting on why orchestras should be funded.

As for private donors, Tony Woodcock — the president of the New England Conservatory, and before that the executive director of the Minnesota Orchestra — has, in his blog, talked about "donor fatigue," a tendency for longtime donors to get tired of giving money, because, as the years pass, the problems orchestras have keep getting worse. And there's something else. Classical music donors — like the classical music audience — have been growing older. As you'll see from your reading, David Gockley, the general director of the San Francisco Opera, says that half the donors he depends on most are now over 70!

Here's what might look like one bright light. In recent years, donors have given some very large gifts. Like, for instance, the \$20 million Juilliard just got for its historical performance program. But for orchestras and opera companies, these gifts can seem to be far more significant. They come when the institutions need money badly. An orchestra or opera company might be having bad financial trouble, and someone will give millions of dollars to make things better.

But is this really good news? Maybe not! A healthy institution doesn't need to be bailed out with a large gift. Peter Gelb, acknowledging quite a large gift two seasons ago, said (with surprising honesty) that the money would get him through the year, but wouldn't solve the Met's long-term problems.

And there's another difficulty. These gifts -- by their very nature -- won't be repeated. There are only so many donors who can afford to give huge amounts, and those who can aren't likely to do it more than once. What happens, then, if financial troubles continue? Who's going to bail the Metropolitan Opera out two years from now?

The recession, of course, makes all this even worse. As does something else, which is that, while income falls, expenses tend to rise. This is a long story -- it comes, in fact, from a principle of economics widely understood to affect any activity that doesn't show gains in productivity. A company that makes things -- cars, baby strollers, whatever -- gets more efficient over time, spending less money for each stroller it makes. And so it can pay higher salaries, and buy whatever new technology its factories and offices might need.

But orchestras and opera companies can't get more efficient. You can't play Mahler with a half-sized orchestra. Even so, though, you have to pay higher salaries, or else no one will work for you. And your halls and offices need new technology. The result? You're always falling behind. As time goes on, you have to raise more and more money, because the income you make from performing keeps falling. Not in absolute numbers -- you might take in more dollars now than you did 10 years ago -- but as a percentage of what it costs you to operate. We can see this trend operating -- on a striking scale -- if we go back in history. In 1937, a large study was made of American orchestras, which showed that ticket sales paid 70 to 90 percent of their costs. Now the number is 40 percent and below.

So as time goes on, the financial crunch grows worse. These institutions need more and more money, just to survive. This is why orchestras privately say that they run structural deficits -- that, over decades, they find that they're spending more money than they take in.

The bad economy, of course, makes all this worse. As does the decline in interest in classical music. So now we seem to have an emergency. Costs have to be cut, and so classical music institutions are making whatever cuts they can. As I've said, some (perhaps many; I haven't seen statistics) are giving fewer performances. Certainly (according to a story that ran in the *New York Times*), there's less work for freelance classical musicians. Opera companies use far less lavish sets and costumes.

And there's one cost that orchestras have very notably been cutting -- musicians' salaries. These have been in free fall lately, with musicians in many orchestras being asked to take pay cuts, sometimes large ones.

All this hit home most strongly in the Detroit Symphony contract negotiations last year, which led to a strike, and could have destroyed the orchestra's entire season. The strike was settled and the season survived, but the crisis was plain to everyone. The Detroit musicians were asked to take pay cuts, and -- at least in the management's original proposals -- to spend more time working in the community, and less time playing full orchestra concerts. Management backed off that last demand, but orchestras

throughout the US, faced with declining ticket sales and funding, are trying to ramp up community activity so they can generate more support. It's hard to believe that many other managements, in the future, won't follow the Detroit lead, and ask for community performance to be part of their musicians' contracts. As just happened in Colorado!

For musicians, this is understandably a shock. To do performances at what seems to be a lower artistic level, for more pay – that's not what the current generation of musicians ever expected. But it may well be their future.

Making Changes

Of course the classical music world doesn't sit quietly, watching itself die. There's activity, sometimes almost wild activity, as people try to make changes. These changes take two forms, which I'll call conservative and radical, though I don't mean to dismiss the conservative ones.

Conservative changes preserve the classical repertoire, as we've known it for so many years, and also at least the broad outlines of the performance styles we're all familiar with. But musicians now might talk to the audience. The stage might be lit in more or less dramatic ways, to reinforce the mood of the music. Musicians might dress less formally. Musicians might be available before or after a concert to talk to members of the audience. The audience might be given chances to participate — to vote, for instance, on which of three new pieces they like best.

Radical changes go further. String quartets might play in clubs. A new music festival (I'm thinking of the annual Bang on a Can marathon in New York) might happen in a large public space, with free admission, and the audience welcome to come and go as it likes. Composers (Steve Reich and Philip Glass started this in the 1970s) might form their own ensembles, and find their own audience, outside the classical music world. New music might start sounding like pop music, with electronic instruments and a beat. Classical music is combined on concerts with dance music and alternative rock. Performance styles, even for standard repertoire, become freer, more personal, and more informal. Classical musicians turn into entrepreneurs, looking for any audience they can find, especially on the Internet. Some music schools – most recently, Manhattan and NEC – have launched entrepreneurship programs, to teach musicians how to make careers in new and different ways. Juilliard is talking about doing something similar.

The radical changes seem, at least to me, the most important. They make classical music look, feel, and even sound like what goes on in the rest of the world. And what's most impressive is – as we'll see, later in the course -- that they really do attract a new, young audience.

The big problem, though is that these new-style concerts (which I like to call "indie classical") don't make much money. So they're not ready, yet, to replace the classical music mainstream. How can we maintain classical music on the scale at which it currently operates, if concerts get smaller, and attract a younger audience which won't have the money for large-scale donations that the current, older

audience has? I'm not saying that a new financial model won't evolve, but we haven't seen it yet. One of our great tasks for the future will be to find it!

Footnote, about funding

Once we understand that classical music isn't the only music that we can call art, how can we justify spending so much money to — just for instance — keep major orchestras functioning 52 weeks every year? Obviously, they ought to get *some* money; they keep alive a form of musical art that can't earn its keep in the marketplace. But should they get as much as they're getting? As time goes on, it might be harder and harder to argue that they should.

And I see signs that this is more than a theoretical discussion. You'll see from your reading that the question has been strongly raised in Australia. And it simmers elsewhere. The current level of funding for classical music was challenged, when the recession hit, in San Francisco, where a city official said publicly that he'd cut funding for the San Francisco Symphony because they paid their music director, Michael Tilson Thomas, very lavishly. This became a hot discussion in the city's Board of Supervisors, which is what they call their city council. They had to choose between funding the opera, ballet, and symphony, and funding health clinics for poor people. Supporters of health clinics showed up at meetings, furiously angry. Would you want to be there alongside those people, representing the opera, demanding that *you* get the money?

And a front-page story in the *New York Times* discussed a new consciousness in charitable giving. An economist has theorized that tax breaks for those who donate money may promote inequality. Why? Because studies show that only 10% of charitable donations go to causes that actually improve how people live. The other 90% goes to things that rich people enjoy, and which are part of rich peoples' culture — new buildings for elite universities, and the arts. This doesn't mean that the benefits of these things don't spread beyond the rich; obviously they do, at least to some extent. But donations go to them primarily because the rich enjoy them, not because they're seen as any route to social betterment. And it turns out, according to the *Times*, that at least some wealthy donors are starting to see that this is true, and aim their giving away from classical music and other elite, expensive forms of art.

Second, and maybe even more important (as a symptom of a larger cultural change), is an evolution in the social structure of New York. For years the richest zip codes in New York were on the Upper East Side, where the old social, financial, and political elites were found. These were the people who, among many other things, supported the arts.

But now the money — along with political and social power — has moved. The richest, and most powerful zip codes are now downtown, in Tribeca. Does Tribeca support the traditional arts? Apparently not. The people who live there have much more modern taste, and they certainly don't appear to care about classical music. I asked around, and learned that at least one of New York's big classical music institutions has hardly any ticket-buyers from Tribeca. Which zipcode

buys the most tickets (for this, and, I've found, other classical music institutions)? You guessed it — the Upper East Side.

So here we have what seems to be a tangible — quantifiable — emergence of the cultural change I've been outlining. The new generation of wealthy, powerful people in New York (and I'm sure this is echoed in other cities) don't support classical music the way the older generation did.

And if this is really true, where will classical music get its money, as the cultural transformation continues?