

# Findings from the FIM International Survey on Orchestras

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## Introduction

May I take this opportunity to thank the International Federation of Musicians for inviting me to speak today, at the first International Orchestra Conference. I have been working over the past couple of months analysing the data collected from FIM's recent questionnaire on orchestras, the result of which have been compiled into a written report which I believe is now available. Today I will talk you through some of the many interesting findings that have emerged from this research.

Before I start, I would like to make special mention of Katharina Brodoehl who, during her time with the FIM, has worked tirelessly to process the data from the survey questionnaires, for which we are exceedingly grateful.

As you can imagine, the results of the survey cover a very broad range of topics, and there is certainly not time enough here to go through them all, so I encourage you to read the full report. Today, though, I intend to highlight just some of those key findings about the current state of orchestral employment, specifically from the perspective of musicians. I have attempted to keep the statistics to a relative minimum: and I am also aware that certain figures quoted may appear at odds with your experiences, or appear to crudely under/over-estimate certain situations. As such, I ask you to frame this presentation, as you should the research as a whole, as primarily the basis for discussion and debate, with the potential to guide future research and negotiation.

## Background

By way of an introduction, I would like to provide some context to the research, which came into being around three years ago, when work began on this conference. Initially seeking to explore the activities and working conditions of Opera orchestras, the project extended its focus to assess the situation of orchestras of all types at an international level. Its purpose was twofold:

1. To provide material to feed into discussion at conference.
2. To build a database for use by FIM members and orchestral musicians at a later stage (which may in the future be made available on-line).

The questionnaire was forwarded to orchestras via the various member organisations of the FIM and its contacts in countries that are not yet members. These were returned and integrated into a database and used as the basis of analysis. Information was also drawn for comparative regions from published sources for orchestras based in North America.

In total, this survey covers 164 orchestras spread variously across 24 countries. The majority of orchestras included here are based in Europe, although some 43 relate to organisations across the Middle East, Oceania, the Americas and Asia. They are roughly split between orchestras affiliated with an Opera/Theatre, and those attached to either a broadcasting institution or some other organisation.

The orchestras vary widely in size, age, their main performance activities and the way in which they organise themselves. Some employ as many as 170 musicians, others as few as 22. Notably, however, the results here relate to a work-force of musicians that totals some 12,000.

The questionnaire was split into 9 sections, each of which sought to tackle a different dimension of orchestral employment. These are summarised in this slide. However, for the purposes of this presentation, the focus will be on the following: the nature of orchestral performance, touring and recording activities; current contractual arrangements for employees; collective agreements in force across each orchestra and the role of their respective musicians' unions in negotiating the conditions of service for the profession.

To begin, then, with the 'stuff' of orchestral life: what we play and how often we play it...

## Performances

The orchestras included in this survey tend on average to perform between 120 and 150 times per year, although a good quarter of them do significantly more than this. To some degree, these performances will involve playing abroad - indeed 59% of orchestras claim to tour at least once every two years (many tour significantly more than this) – but in general, these performances comprise ‘regular’ concerts and operas. Less than half of the orchestras included here undertake ballet performances, and even then they constitute for the majority of the sample only 5% of their yearly programme.

For the large majority of all other orchestras (90%), their programme of activities does include at least one recording and between 5-6 broadcast performances. Perhaps unsurprisingly, the exception is found within orchestras attached to a Broadcast institution, for whom broadcasts constitute almost half of their entire programme, and who produce almost three times as many recordings than the international average of 6.

Furthermore, Broadcast-affiliated orchestras tend to rehearse longer than any other type – anywhere between 3½ and 4½ hours – be it for Recordings or Opera performances. Comparatively, rehearsals for operas by all other organisations tend to last a good hour less than this. As it is, orchestras specifically attached to Opera/Theatres rehearse for shorter periods of in general. (Recordings - 3 hours and Concerts - 2 hours 50 minutes).

Interestingly, orchestras in Central and South America devote more time to rehearsing for recordings – 3 ½ hours in fact – than they do to concerts (just under 3 hours), despite producing very few each year. More interestingly, they apparently spend no time at all practising for operas, even though they constitute 3% of their combined programme. They still apparently attract audiences of up to 2,000 people: though I’m sure the lack of rehearsals has nothing to do with this! Joking aside, despite these large audiences, and the relatively high ticket prices in this region (of 30 ), orchestras based there perform half as many times per year than any other region – 54 in fact – which perhaps explains why their box-office takings constitute only 4 to 5% of their overall income.

Orchestras in Asia, specifically Japan, play to the largest audiences, typically selling tickets for more than 1500 seats per concert. And given that they apparently perform more than 200 times per year on average, it is impressive that they find the time to rehearse for as long as they do – on occasion lasting up to 7 hours (for operas).

Orchestras in Eastern Europe perform 69 times on average a year, to audiences ranging in size from 500 to almost 900. This is around half as often as those based in the West, who also tend to play in front much larger audiences and charge much higher for seats than orchestras in the East (35 on average compared to 9 ). Despite these differences, the income generated through the box-office (as a proportion of their overall budget) is relatively steady across Europe as a whole, between 15% and 16%, which is in fact typical of orchestras across the sample.

In fact, there appears to be little relation between the number of times an orchestra performs and the amount they generate through selling tickets as a percentage of their annual overall income. A substantial number of orchestras sell tickets for a very low price, and in some cases perform to audiences for free! When we look at the average across the entire sample, the cost of tickets is generally quite low – just under 31 , albeit that tickets for Opera/Theatre affiliated orchestras are a good 5 more than this and can run to 300 . It costs more to see a performance in Luxembourg and Switzerland than anywhere else in the world: with the average price of a seat costing 50 and 53 respectively.

Whilst there is no real way of assessing the cost of tickets relative to the salaries of those whom we pay to see perform (!), it is nonetheless interesting to see that the average wage for musicians in both of those countries are higher than in any other! And this allows me to move smoothly into the next section...

## Wages

Wages are generally set out within orchestras’ various collective agreements, according to varying pay bands, which either do or do not relate to specific positions within the orchestra. It would be useful to undertake a survey to map how musicians are allocated to different grades of pay based on their term of service, performance position and other factors.

The average minimum wage for an orchestral musician across the entire sample is around 27,500 , although this figure varies depending on the country in which the organisation is based, the type of orchestra and the position held by the employee.

The most obvious imbalance is a regional distinction in average minimum salaries, calculated for musicians holding the position of Principal, Co-Principal and Tutti. At the one extreme, the highest wages for all three categories are to be found in orchestras based in Western Europe – namely Norway, Switzerland and

Luxembourg – and the US, which between them pay 20 to 30,000 more per year than all other countries. Acknowledging the variance in GDP and comparative socio-economic state of these regions, it is still nonetheless interesting to note that salaries for musicians are at their lowest in countries based in Eastern Europe, particularly the more recently established countries which in some cases pay on average less than 3,000 per year to their musicians.

Musicians based in Central America, the Middle East and Asia tend to earn between 10 and 15,000 less than the international average; whereas the average salary for all categories of employment in orchestras based in Germany, the UK and France are shown to be around 8,000 more than the international average. The relative similarity in wages in these three countries may well be a recent development, though, if we consider the stark difference in reported salary increases over a 20 year period from recruitment: with orchestras based in France reporting only an 11% increase, the UK 21% and Germany almost 58%.

It is particularly interesting to note that, whilst Slovakia has one of the lowest average minimum wages for Orchestral musicians, these salaries appear to have increased by anything from 30 to 100% over a period of 20 years; especially considering the average wage increase over the same period in Macedonia is only 1%. For those orchestras based in countries with the highest wages, the increase tends to be between 11 and 25%, which is notably less than the general average of 32%. This suggests that there has been some attempt to bring salaries into line with those organisations paying more within and across regions.

It is notable that orchestras affiliated with a Broadcast institution tend to see a higher increase in wages than any other type of orchestra; this corresponds to the fact that the average wages for Principals, Co-Principals and Tutti are also significantly higher than the international averages, in some cases by more than 20,000 .

There also appears to be some relation between the size of orchestra and the average wage of musicians: it certainly pays to be a member of a larger orchestra! Although of course, it could be said that the higher wage for musicians based in bigger orchestras is counterbalanced by certain other issues relating to working for a large organisation: more of which later!

As would be expected, larger organisations have higher running costs: but this does not necessarily translate into higher wages for their employees. In fact, it appears that the proportion of the overall budget spent on musicians' salaries diminishes as the overall budget increases. On average, orchestras spend 54% of their total budget on musicians' salaries; but this figure rises to more than 62% for orchestras that employ more than 100 musicians (Full-time Equivalents).

### **Contracts & Terms of Service**

Despite the variation in wages across countries, the vast majority (80%) of the musicians covered by the survey are employed on a permanent, full-time basis. The notable exceptions are in Asia, where contracts are permanent but roughly split between full- and part-time employment; and in Eastern Europe, where only 25% of musicians based in Hungary are permanent and full-time: almost a third are part-time and employed for a fixed-term only. In all other cases where orchestras have part-time contracts in place, they generally account for less than 6% of each country's workforce of musicians.

Under the terms of their employment, the majority (93%) of musicians count recordings among their contractual duties yet they are included in the salaries of only half of them (49%). In addition, two-thirds of orchestras consider travel time when on tour as service. Those that do not are based largely in the Middle East and North America.

The survey also highlights the fact that the majority of musicians (67%) are placed on probation for between 6 to 12 months when they first join an orchestra.

The age at which musicians are entitled to officially retire from orchestras is generally set between 60 and 70. In the case of South America, the maximum age for retirement is in fact 75; whereas it is the norm for retirement in Western Europe to be set at 60-65. In Eastern Europe, the minimum age for retirement is actually lower than the rest of the sample, set variously between 50 and 58; in Asia it appears that some musicians can retire as early as 32! So early a minimum retirement age could be seen to compensate for the orchestras in Asia at least performing more often during the year than those in most other countries, with notably less holidays, and their being worn out by opera rehearsals which tend on average to last anything up to 7 hours at a time!

Forced comparison aside, it is in fact those same orchestras that offer their employees retirement in their 50s, all based in Eastern Europe and Asia, which have the longest working weeks by a substantial margin: albeit that the number of duties required of them each week is actually 2 lower than the international average of 8.

In fact, it is musicians based in the UK that are obligated to the highest number of duties per week (at 10); and while the number of hours they work per week is a good 10 below that of many orchestras based in Asia and Eastern Europe, the UK average is nonetheless one of the highest in Western Europe (29) alongside Sweden and Finland (36). Furthermore, despite having only 4 weeks paid leave per year, Japanese musicians actually tend to be obligated to the least number of days in total throughout the year (only 171), whereas those in Western Europe variously work between 2 and 16 weeks longer than the international average of 39. That said, orchestras in this region tend on average to receive 6 weeks of paid leave per year.

Orchestras based in North America tend to work an average of 179 days (or a total of 36 weeks) per year; three weeks less than the international average. However, those in the US are given 7 weeks annual paid leave, yet musicians in Canada apparently receive only 3.

Across this sample of 164 orchestras, it can be stated that, on average:

- Orchestral Musicians work an average of 26 hours per week. Those that work more than this are based in Europe and Asia. Those working for a Broadcaster have a shorter working week (at 24 hours) than all other types of orchestras.
- However, Broadcast affiliated orchestras tend also to require their musicians to undertake on average 10 duties per week, rather than the 8 in all other organisations. It is worth highlighting that the minimum basic salary does increase with the number of duties for which musicians are required per week. This reflects the fact that European musicians do undertake more duties per week but are paid significantly more than those working in other regions.
- Musicians holding Principal roles work the least number of days per year (194), with Co-Principals working 196 days and Tuttiis 200.
- The majority of orchestras (70%) give their musicians 1 day off per week; although 25% allow them 2 days: those that do are all based in Europe, with the addition of one from Mexico. In most cases (71%), employers do not determine the particular day of the week that musicians are entitled to take off.
- There does not appear to be a correlation between the number of days that orchestras give their musicians and the length of the working week in hours. However, there is a slight tendency for the holiday entitlement in weeks to increase as the obligated number of working days per year increases. The average holiday entitlement across the sample is 6.3 weeks, although it is only 5 within orchestras attached to a broadcaster, likely related to their working a greater number of days than others, but shorter weeks than others.

In addition, the conditions of service across this sample appear to include in two-thirds of cases musicians being on-call; the majority of which (68%) are not compensated for this.

Where an on-call system is in place in orchestras based in the Middle East, Oceania, and the Americas, musicians are always compensated. In Europe, only Finland and Macedonia do not have such a system in place. Across Eastern Europe, though, it is rare for musicians to be compensated; whereas it is slightly more common in the West. Only in Italy and Lithuania are musicians always compensated.

In nearly all cases where musicians are permitted to hold a teaching position whilst employed with the Orchestra, they are also allowed to partake in other forms of individual performance activities 'off-the-clock' so to speak. Certainly, this is the case across all orchestras based in the Middle East, Central & South America, Oceania and Eastern Europe. In Western Europe though, it is more likely that musicians are allowed to teach but not in addition to performing outside of the orchestra. A particular exception is found in India, where orchestras do permit their musicians to play elsewhere but not to hold a teaching position.

In addition to the holiday entitlement and days off, as already detailed, just under 50% of orchestras provide the additional benefit of providing assistance to their musicians for the purchase of instruments: I assume this means a financial contribution, rather than merely advising employees on where best to go shopping!

None of the orchestras based in Asia, the Middle East and South America and only some of those in Europe provide such help – buying rather than shopping ideas – although the majority do take responsibility for damage to instruments (87%) and/or provide a bonus for their upkeep (70%). This is just as well, since in many cases, musicians are not provided with individual lockers in which to safely store the tools of their trade. Furthermore, a relatively small percentage of orchestras provide specific insurance cover for damage to, theft or loss of instruments.

All in all, the facilities provided in a substantial proportion of the venues in which orchestras rehearse and perform are not ideal. Certainly, half of the orchestras appear concerned with the state of the Green Room, if there is one at all. In some cases, employees are not provided with a dedicated space separate from the rehearsal

room or backstage in concert venues, often having to use the foyer or a cloakroom. In at least one-fifth of cases where separate rooms are provided, they are said to be over-crowded with nowhere near enough room to change, store belongings or warm-up. Often, they have poor lighting, can sometimes be dirty (particularly in concert venues), with too few lockers and occasionally no separate dressing areas for men and women. Where they do exist, it is reported that women get a poorer deal, with less space and too few toilets!

There is no obvious regional variation in the state of the facilities available to musicians, except to say that almost none of the musicians based in the UK or Asia appear to have the use of personal lockers or, in many cases anything resembling either a Green Room or a warm-up space. Comparatively, the majority of those in Scandinavia appear relatively happy overall with their lot; which more often than not includes a cafeteria, if not a bar, plenty of light, airy spaces for dressing and to warm-up, enough lockers and, in one case, a sauna. It is perhaps more useful to build an image of the ideal dressing room, on the basis of what the survey results – both positive and negative – tell us are the minimum requirements for adequate working conditions. It is relatively simple, and perhaps obvious, but the standard facilities that should be made available to musicians, bearing in mind the relative size of different orchestras, are:

- Separate dressing rooms for men and women, which are clean and well-kept, have good lighting, chairs at the very least and enough toilets and the availability of a shower
- Personal lockers for belongings and / or wardrobes, and additional lockers large enough to store all kinds of instruments, all of which should be provided with a lock
- Enough practice rooms
- A cafeteria or kitchen or 'Artist's Café', and possibly a bar, with a Television, free ear-plugs and a physiotherapist on site.

Actually, the last two were not highlighted as essential to the provision of an adequate green room, although perhaps they should for the handful of orchestras (16.5%) that have yet to put in place special measure to reduce noise-related risks or consult musicians over the choice of chairs! As it is, more than 80% of organisations do both these things. Such damage limitation is perhaps explained by the fact that they all have cover in place for occupational injuries.

Interestingly, only 30% of orchestras have insurance in place to cover accidents caused in the process of travelling to or from work. This may explain why so many make provisions for touring such as limiting the amount of time their employees can travel without rest or sleep. Admittedly, there is no obvious pattern in the conditions set for the length of journeys in terms of the maximum time or distance musicians are allowed to travel in one go. Interestingly, several orchestras based in Europe specify that when using the train, they only ever travel 1<sup>st</sup> class, though economy when flying. As a point of principal, many orchestras in Asia state that they fly only when absolutely necessary, and use the train rather than travelling by road.

There does not appear to be a standard as to the number of days musicians are required to work consecutively or the amount of free-time they are afforded while on tour. Nevertheless, it can be stated that, unless playing a concert, in which case the journey time is limited to 4 hours, it is more common than not for musicians to be given the evening of their arrival at their hotel as rest time.

Indeed, for the large majority of orchestras, the comfort of their musicians while on tour appears of foremost importance: the vast majority of them can guarantee them at the very least a single room in a 3-star hotel when away. That said, when work schedules on tour are as punishing as the survey suggests – with musicians given relatively little time for themselves – one may wonder whether exhausted musicians much care if their hotel is 1 star or 5 star so long as they get a bed! Interestingly, where musicians are required to share rooms, it tends to be in accommodation at the lower end of the scale; the only saving grace perhaps being that orchestras using 1- and 2-star hotels tend to provide a higher per diem on average than most, 1.5 times as much even as the average of 44 for musicians staying in the most fancy of hotels! When the per diem is expected to cover accommodation costs, however, or is expectantly used to pay for breakfast at the hotel, as is reported to be the case in two or three orchestras, musicians may be advised to think about bargaining with their employers for, well, more! And so, another smooth segue...just how does an orchestral musician go about negotiating the terms of their employment? What kind of collective agreements are there in place? And to what extent are musicians given the opportunity to express their concerns and feed into their employment situation?

### Negotiation + Organisation

It should be remembered that the questionnaire did not garner many findings reflecting the personal attitudes of musicians towards their position as organisational employees, and nor was it intended to. However, it is still

possible to state with some confidence that orchestras do in general make efforts to provide musicians with a variety of channels through which to express their collective concerns. Primarily, these take the form of some representation on Orchestral and Artistic Committees. Admittedly, a larger proportion of orchestras attached to a Broadcaster or an Opera/Theatre have musicians represented on Orchestra Committees, but in all cases, 70% or more have such arrangements in place. Less than 50% of orchestras have musicians sitting on Artistic and/or Programming committees. In addition, several orchestras in Western Europe, and all of those in Oceania and the Middle East have some form of Players or Workers' committee in place. Even where there is no specific Union committee, more often than not there is some other form of Union representation on the above committees. This perhaps explains why more than 80% of orchestras have agreed their audition procedures with their respective musicians' union. In almost all of these, musicians and/or union representatives sit on audition panels.

Far fewer orchestras – just over 50% in fact – have agreed their dismissal procedure with their respective unions; although four-fifths of them do have musicians and/or union representatives sitting on dismissal panels themselves.

There is little detail regarding the composition of other committees though: except to say that in North America, a minimum of 5 musicians sit as members on both the Orchestral and Artistic Committees. In general though, between 60% and 100% of orchestras indicate that there is a Union Steward who attends most committees on behalf of musicians' and a variety of other meetings with management or executive and the administration. Unsurprisingly, their key aim is said to be the negotiation of Collective Agreements for employees.

The majority of Collective Agreements in force across the sample are Orchestra-specific (72%). Two-thirds as many orchestras employ Branch Agreements; whereas less than one-fifth use a Broader Agreement, such as one set out for a specific field of employment or by a wider labour Union organisation. All those that employ all three kinds of agreement are based in Western Europe and North America. All the orchestras based in the Middle East, in Central and South America and in Asia have only one type of collective agreement in place.

In addition to these official channels of communication, the majority of those surveyed also hold full orchestral meetings at regular intervals throughout the year and if and when needed. In many cases, these are said to involve the delivery of information from management and the administration to employees, although in Central America these meetings are said to afford musicians the right to vote publicly on various matters. Opportunities to interact socially with each other in a less formal manner also exist for musicians by way of the facilities available to them on a day-to-day basis, and in the form of social events such as annual / seasonal parties.

There appears to be a greater degree of open and free exchange in smaller organisations, which is perhaps to be expected. Although, notably, many of the orchestras that highlight these more social and informal kinds of interaction are based in Scandinavia. Indeed, they happen to be the very same orchestras that highlight in the survey the recreational spaces made available to musicians in their work-place, be it the cafeteria, TV room or Artists' Café. Certainly, the importance of acknowledging the tangible elements of employees' working conditions should not be underestimated, and it would be interesting to explore the more practical elements of rehearsing, touring and performing from the perspective of the musicians themselves.

## Further Research

There is no doubt that further, more detailed research could be carried out into each of the areas this current survey covers. Certainly, more work could be done comparing the ways in which orchestras are funded, the specifics of musicians' contracts and the collective agreements in place across regions. It would also be extremely interesting to undertake a more qualitative project exploring the attitudes of, on the one hand musicians, and on the other management and administration, across the world to compare broader cultural aspects of orchestras as sites of occupational and interpersonal relations.

What is more pressing, however, is the need to undertake further concerted research into the exact nature of orchestral employment, in terms of the social rights of musicians, the benefits they are afforded under the terms of their contracts, and exactly what standards, if any, have been set for musicians on tour and the obligations of duty. What is not in doubt, however, is that this survey makes an invaluable in-road into a better understanding of the international climate of orchestral employment and organisation. Certainly, this research has highlighted some key areas that the FIM, its members and Orchestras around the world can work to address so as to continue to progress the economic and social interests of musicians for the benefit of the profession and music audiences the world over.

Thank you.