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Press release - Appendix

Musical Life in Germany: Structure, facts and figures

Music is a major component of Germany's cultural self-image and continues as ever to enjoy high prestige. Well over 10,000 musical institutions and initiatives appear in the databases of the German Music Information Centre (MIZ), ranging from training and educational institutions to orchestras and theatres, from festivals and funding facilities to foundations and associations, and from documentation and research centres to the many branches of the music industry. They represent a great musical heritage and a lively music scene in which a very broad array of genres, styles and contrasting musical cultures evolve and unfold. Below you will find some key facts and figures on musical life in Germany.

Symphony Orchestras and Music Theatres

At present Germany can boast of 133 publicly funded **symphony orchestras** and 83 **music theatres**, all of which set standards for an ambitious programming policy extending from early music to the contemporary scene. Last season more than 20,000 musical events were held by publicly funded institutions alone. Of these, roughly one-third were concerts and the remaining two-thirds performances of music theatre. The events reached some 12 million visitors, with two-thirds falling in the area of music theatre.

A growing number of institutions are devoting themselves increasingly to the advancement of children and young people. According to figures from the German Orchestra Union, the number of educational events mounted by orchestras rose sharply over the last years. If some 2,100 events for children and young people took place in the 2003-04 season, by 2009-10 there were already more than 4,000.

In recent years the orchestra landscape has changed dramatically as orchestras have been merged or disbanded. German Reunification was followed by a far-reaching wave of restructuring and consolidation, especially in the former states of East Germany. Of the 168 orchestras that used to exist, 133 are still active today. Many ensembles were shut down, especially in Saxony-Anhalt, Saxony and Berlin. But even in the former states of West Germany a total of 11 ensembles have been disbanded or merged. Since Reunification the registered number of jobs has shrunk by more than 18 percent, going below the 10,000 mark for the first time in 2010.

Music Festivals

Quite the opposite is noticeable among organisations that are largely independent of public funds. The post-Reunification years have witnessed a veritable boom in **music festivals**, leading to a festival landscape of previously unknown richness and variety. The range of programmes offered by these festivals is enormous: they extend from broadly conceived 'classical festivals' to specialist festivals for early and contemporary music all the way to boutique festivals for the myriad currents of popular music. At present the MIZ lists some 480 major events that recur on a regular basis. Fifteen years ago the figure was around 140.

Musical Education and Training

But the changes in Germany's musical life are not only structural: the contents themselves have undergone a great transformation, as can be seen by a glimpse at the current situation in **musical education and training**. Here an entire sector has entered a state of upheaval with the advent of all-day schooling, including the challenges it places on music instruction, and with the reforms introduced in music education to meet demands for international consistency in degree programmes (bachelor and master's degrees).

The importance of **music instruction in the state school system** cannot be overestimated as it brings every single pupil into contact with music education. In grades 1 to 10 the lessons are anchored in weekly lesson plans, either directly as compulsory subjects or indirectly as part of larger learning areas or combined subjects. At the upper level, music instruction is subject to various constraints as a compulsory part of the composite field of language, literature and the arts.

Some 47,000 music teachers are employed in Germany's many types of schools, amounting to roughly six percent of the total number of teachers. This is an alarming figure, for there has long been a striking shortage of music teachers, particularly in elementary, lower secondary and special schools. Studies conducted by the Association of German School Musicians (VDS) show, for example, that only 20 to 30 percent of music lessons at the elementary school level are given by properly trained music teachers, while 70 to 80 percent are taught by non-musicians or not at all.

Nevertheless, a number of schools with a special commitment to music education even offer extended forms of music instruction or provide instrument or voice lessons. The MIZ currently lists roughly 350 institutions along these lines.

That music is a permanent fixture in the lives of Germany's children and young people is also shown by the constantly growing numbers of pupils in its **public music schools**, which are usually operated at the municipal level. In 2009 more than 950,000 children, adolescents and adults took advantage of these offerings in instrument and voice lessons, early music education, elementary training or ensemble playing - an increase of 90,000 over a ten-year period.

In short, there is a trend toward learning to play an instrument, even among the very young. The beginning age for children has dropped significantly: the percentage of pre-school children up to the age of five has risen over the last ten years from 14 to roughly 17 percent.

All in all, the Association of German Public Music Schools (VdM) currently lists a total of some 900 publicly-funded music schools with a nationwide network of more than 4,000 sites and more than 36,000 teachers. The total budget of its registered schools amounts to 825 million euros, with roughly half being obtained from tuition fees.

Germany's state schools are increasingly entering cooperative arrangements with institutions outside the public school system, whether as part of all-day schooling, classroom music-making or other projects. The largest joint undertaking between state schools and public music schools is currently the 'JeKi' project, an abbreviation for '*Jedem Kind ein Instrument*' (An Instrument for Every Child). It was first introduced on an extensive basis in the Ruhr district in 2007-08 and has found imitators throughout the country. The project enables all elementary school children to learn a musical instrument of their choice, regardless of their social status or background.

Education for the musical professions is carried out in a wide range of specialised educational and training institutions, including tertiary-level schools of music (*Musikhochschulen*), universities, teacher training colleges, polytechnics, tertiary-level schools and institutes of church music, vocational schools, public or private facilities e.g. for popular music or the theatrical professions, special training centres for music instrument makers, and many more.

A total of 24,000 students (excluding those at conservatories and music academies) were enrolled in professional degree programmes at Germany's tertiary-level institutions in winter semester 2009-10, including more than 60 percent at *Musikhochschulen*. Roughly half of the students were enrolled in performance and composition programmes, nearly a third in music education programmes, and roughly a fifth in musicology. The number of students admitted for examination has risen over the last decade, especially in performance and composition programmes and in musicology. Even the teacher training programmes, after years of

decline or stagnation, witnessed a sharp increase in 2009. Given the shortage of qualified teachers in the state school system, this is a welcome sign.

The worldwide demands for compatibility in advanced degrees within the framework of the so-called 'Bologna Process' and the associated introduction of bachelor's and master's degree programmes have introduced an ongoing process of fundamental reforms in the study of music at tertiary-level institutions. The duration of the degree programmes has become more varied as courses of study are adapted or restructured. For practical programmes, the Conference of the Ministers of Education and Cultural Affairs (KMK) has prescribed a period of four years for a bachelor's degree (BA) and an additional two years, if desired, for a master's degree (MA). Apart from that, at least three years plus an additional one or two years, respectively, are envisaged at the tertiary level. In most places of study the Bologna Process has already been put into effect. It has led many tertiary-level institutions to set new emphases and to introduce new courses of study, thereby creating possibilities for individual profiling among the students and new options for interdisciplinary coursework.

Amateur Music-making

Amateur music-making has a long history in Germany, forming the foundation of its musical culture to the present day. At least seven million people are actively involved in making music during their leisure time. They regard music as a permanent part of their lives and constitute an indispensable factor in the preservation, further development and vitality of Germany's musical life.

The range of activities in amateur music-making is enormous, extending from choral singing to brass ensembles and guitar orchestras, from marching bands to mandolin groups, from symphony and string orchestras to rock and pop bands, and much else besides.

With approximately 1.3 million active members, choral singing, whether sacred or secular, takes first place in the popularity poll. Amateur instrument associations can boast of roughly 840,000 registered members.

In addition to Germany's professional ensembles, the great diversity of its amateur ensembles ensures a nationwide range of concerts and musical events of the most varied kinds imaginable. The great choral associations have approximately 50,000 choirs altogether, and there are roughly 30,000 registered instrumental ensembles.

Music Industry

The **music industry** covers a broad spectrum of branches. At present there are about 20,000 businesses in Germany, including concert agencies, music publishers, instrument makers, record companies, manufacturers of sound recordings and a tight-knit network of music retailers. These businesses currently employ approximately 65,000 people, though some branches of the music industry are dominated by freelancers or the self-employed. In the narrow sense the music industry covers everything but the audio market and related branches. Its most numerous branch, music retailers, has more than 2,200 businesses, followed by musical and dance ensembles with roughly 1,800 businesses, and by instrument manufacturers and theatre and concert organisers, with roughly 1,300 businesses each.

After years of stabilisation and growth the music industry (including the audio market) revealed a stagnant trend in its most recent figures (2008), with taxable turnover totalling 16 billion euros. All in all, turnover remained almost unchanged, with a decline of 0.3 percent compared to 2006. However, this development harbours widely varying trends in the branches themselves. Private theatre and concert organisers achieved high growth in the period under discussion, while the manufacture and reproduction of sound recordings suffered losses.

The spearhead of the music industry continues to be the production of sound recordings and music files, with a total turnover of 1.4 billion euros. This is only some 25 million euros more than theatre and concert organisers, who, after an almost 9 percent boost in turnover from 2006 to 2008, are close behind in second place on the turnover scale. They are followed by music retailers, who maintained a stagnant level in 2008 compared to 2006.

The main reason for the collapse of turnover in the sound recording market is the downturn in CD sales, even if the absolute figures, at approximately 147.3 million albums, are still impressive worldwide. The number of music downloads currently lies at 56.9 million, roughly eight times the figure for 2004. Thus, though the turnover in digital music downloads has skyrocketed, it could not offset the decline in physical media.

Nonetheless, the industry has an optimistic view of the future, owing especially to the development of new sources of income. Thus there is a growing trend toward so-called '360-degree models' in which the boundaries separating the classical business branches (music publishers, concert organisers and the sound recording market) are becoming increasingly blurred. Today most of the major players and independent labels already have their own publishing houses, and they are increasingly opening up new business areas such as live entertainment. Conversely, organisers are beginning to become active on the sound recording market.

Despite the stagnant turnover in 2008, the music industry has successfully reversed its slump at the start of the new millennium and is now back in the black.

About the MIZ

The German Music Information Centre (Deutsches Musikinformationszentrum, or MIZ) opened its doors in 1998. Under the aegis of the German Music Council, it collects and documents the structures and developments in Germany's musical culture. The spectrum ranges from music education and training to amateur music-making, and from the funding and professional practice of music to the media and music industry. The MIZ is supported by the Federal Government Commissioner of Culture and the Media, the Cultural Foundation of the *Länder*, the City of Bonn and, in the private sector, Germany's two collecting societies of musical rights, GEMA and GVL.

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