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**FÉDÉRATION DES ENSEMBLES
VOCAUX ET INSTRUMENTAUX SPECIALISÉS (FEVIS)**

NATIONAL STUDY 2014 - 2012 FIGURES -

Completion rate: 87%

(85 questionnaires answered on 99 members in 2012)

+ evolution and trends 2010/2012

61 ensembles have answered both studies => completion rate 72%

FINAL REPORT, JUNE 2014

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EDITORIAL

The study that is conducted by FEVIS every two years on its member music ensembles is an event of the music landscape in France. This study, compiles the 2012 data of 85 ensembles out of 99 members at the time, which objectively confirms its importance with a completion rate of 87%.

With diverse shapes and variable sizes, these ensembles are a coherent movement that never ceases to renew itself and has been a cornerstone of the live, performed and recorded music sectors' evolutions through its originality and its unique spirit. If the music of France has become extremely vibrant, within the country as well as beyond borders, it is mostly due to this movement - the majority of which is represented by FEVIS.

With more than **2 800 concerts** performed for more than **1 450 000 people**, these independent artistic teams represent one of the three pillars of the music edifice in France - side by side with public orchestras and opera houses.

Some have been formed for 50 years, on the basis of the individual artistic project of a conductor, an instrument player or a singer. Our ensembles are based on a mixed economic model: in 2012, 33% of public subsidies on average and 67% of own resources mainly coming from concerts sales, and sponsorship.

They create, produce and perform more than 900 different artistic programmes, hire about 5 000 artists per year, and build a priceless music heritage of more than 1 000 years from Middle Ages manuscripts to contemporary creation.

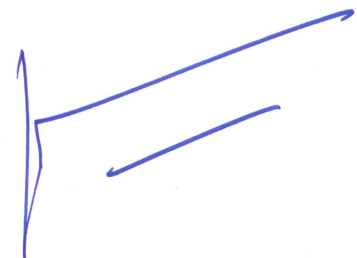
Our ensembles also honour their social role with resolution and commitment. In 2012, they achieved more than 3 000 mediation and awareness activities towards more than 70 000 people all over the country.

Whatever their status is, they hold an important role of "public service" within existing music policies and ask for more recognition from public authorities - all the more urgent considering current hard times faced to ensure sufficient funding of their wonderful projects.

Independent ensembles in Europe belong to the highest traditions of art music. They are constantly driven by expected excellence while representing the innovative wings of music life in Europe.

In France, more than a quarter of our members were created after 2005. This constant dynamic of creation is a testimony of their natural relation to all audiences, younger ones in particular.

Jacques Toubon



KEY 2012 FIGURES

85 answers, from 18 French regions, out of 99 members in 2012.

An exceptional completion rate of **87%**.

Artistic activities

- A great and creative diversity: **972 different programmes, performed from 2,6 and 4 times on average.**
- **81% of ensembles** have declared performing **several repertoires, 19% remain specialized on 1 specific art period**
- A **dynamic production of recordings: 65** new ones by 44 ensembles.
- Mediation and awareness activities are at the heart of their work: **3 000 interventions for more than 70.000 people.**
- **The sector's vitality:** 22 ensembles are less than 10 years old, which is 25,9% of members
29 are between 10 and 20 y.o, 34,1% of members
34 are more than 20 y.o, 40% of members
- **Residencies are a strong support to creation, 45,9%** of ensembles were concerned in 2012.

Market

- **2 889 concerts, 1 493 254 attendees.**
- An average of **34 concerts per ensemble per year**, noting an evolution of team sizes: concerts of less than 12 artists now represent 63% of performed concerts (55,2% in 2010).
- **85% of concerts** are performed in France, **11%** in the EU et **4%** abroad beyond the EU.
- **74,1%** of ensembles perform outside France and 36,4% outside of the EU.
- **29%** of concerts are performed in festivals.
- **15%** of concerts are self-produced - which is a growing part of performed concerts.
- **16%** of concerts are bought by occasional organizers (local authorities, private events) against 8% by national venues and 8% by 'scènes conventionnées' (labelled venues).

Financial data

- **An overall financial value of 59.497.093 M€**
- **67% de own resources (concerts sales, sponsorship...) against 33% of subsidies**
- **33%** of ensembles have a budget < 200 000 €, **25%** btw 200K€ and 400K€, **9%** btw 400K€ and 600K€, **12%** btw 600K€ and 1M€, **11%** btw 1M€ and 2M€, **11%** > 2M€
- **41,9%** of public subsidies come from the Ministry of Culture (75 ensembles receive them, out of 85). Ministry of Culture's subsidies have risen between 2010 and 2012 (+2,1%), but that of DRAC (decentralized national counters) have decreased: -1,9%.
- **55,3%** of public subsidies come from local authorities, almost half of it (**49,2%**) from 'Conseils Régionaux'. Local authorities' subsidies have increased +12,5% (2010/2012).
- **Private funding representing 9% of ensembles' resources.** Private sponsorship: 4.066.327 € (52 ensembles receive them out of 85), civil societies/copyright collective (ADAMI, SPEDIDAM, SACEM...), 1.246.879€ (for 57 ensembles).
- Concerts sales weigh **80,7%** of own resources (74% in 2010)
- The production budget weighs an average of **70%** of total expenditures.
- The total payroll (permanent and 'intermittent': artistic and administrative) weighs **67%** of total expenditures.
- **3,28** salaried administrative staff per ensemble on average.
- **768 307 working hours** in CDDU (short term contract used for artists including 'intermittents') for 85 ensembles, and **5815** hired artists.

EVOLUTION 2010/2012

61 ensembles have completed both studies in 2010 and 2012.

A positive outcome in general

- the repertoires' diversification is increasing from 2010 to 2012
- Small increase (+2,1%) in total number of concerts for these 61 ensembles: **2348/2389**
- An increase in total financial weight : **+6%**
- The proportion of concerts performed through festivals remains stable at **28%**
- The proportion of public subsidies in ensembles' budget is stable: **from 34 to 35%**
- An overall increase in the amount of public subsidies (+4,6%), with significant variations among the different public authorities: State **+2,1%** (including decentralized DRAC -1,9%, first partner in absolute amounts), Conseils Régionaux **+3%**, Cities **+18%**, Conseils généraux **+35%**
- A small increase in the number of hired staff for permanent administrative teams : **+5%** reaching 237 people in 2012.

Mitigated signs on market sales, and its direct consequences on employment

- Decrease in concerts in the EU: **-2,7%** but increase in concerts outside the EU: **+1%**
- Significant increase in the proportion of concerts that are self-produced as opposed to sold concerts, out of performed concerts: **+5,2 %**
- Decrease in total employment hours for artistic staff: **-2%**

More and more discrepancies among ensembles

- The median budget decreases of **-8,8%** in 2 years
- The median **number of concerts per year** goes from 38 to 32 per ensemble
- Public funding amounts have increased for 30 ensembles, but have decreased for 31 others.
- **50% of ensembles have reduced their** permanent administrative teams, 50% have grown
- A significant decrease of artists hired per concert on average: from **16,4 to 14,5** and median **from 10 to 8**.
- Consequently, the median **artistic employment hours** has decreased of **-31,6%** : from 8 404 hours to 5 752 per ensemble.