

**NATIONAL ASSOCIATION OF SCHOOLS OF MUSIC
2008 Annual Meeting**

Report of the President

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For as long as I can remember there have been debates and speculation about the American public's engagement with the arts. Last month, the RAND Corporation released a study entitled "Cultivating Demand for the Arts," whose premise and thesis is this: "Despite decades of effort to make high-quality works of art accessible to all Americans, demand for the arts has failed to keep pace with supply. Audiences for classical music, jazz, opera, theatre, and the visual arts have declined as a percentage of the population, and the percentage of these audiences age 30 and younger has fallen even more. For decades, public funding of the arts has focused on building supply and expanding access to the arts, but it has neglected the cultivation of audiences capable of appreciating the arts." Music as the RAND study defines it isn't the only genre that for some, at least, is facing challenges. The San Diego Union Tribune warned not long ago that "the big challenge for the concert industry is how to fill the void that McCartney, the Stones, and other graying rock superstars will leave when they do retire from life on the road." From the same article, veteran industry analyst Bob Lefsetz says, "There's a huge crisis; a disaster on the horizon...I believe we've lived through the renaissance (for concerts) and it will never come back."

Recently, I ran across this story about Victor Borge, who while on tour in his hey-day back in the fifties, found himself presenting a concert in Flint, Michigan one evening, to a hall that was only half full. He looked out at his scant audience and said, "Well, the people of this good city are really prosperous...each of you has bought two or three seats!"

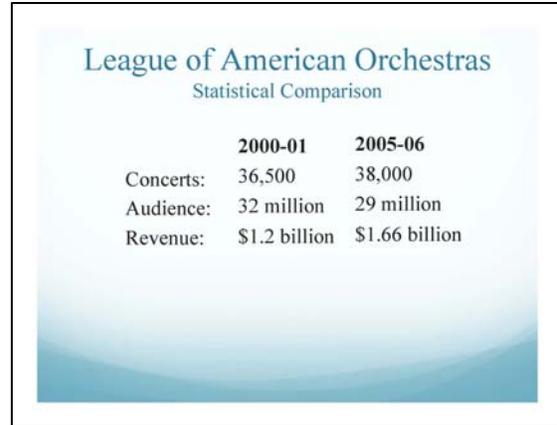
In late October, at about the same time the RAND study was released, Leon Botstein, President of Bard College and Music Director of the American Symphony in an opinion piece for the Wall Street Journal, wrote, "The heralding of the demise of classical music is based on flimsy evidence. The number of concert venues, summer festivals, performing ensembles and overall performances in classical music and opera has increased exponentially over the last four decades."

Given all the prognostications, warnings, anecdotes on the state of our art in this country, I wondered if it would be possible to gather enough data to provide us with the facts of the matter, in other words, the status and standing of music in America by the numbers. Is there a way to really know what the statistics might be for participation in structured music education programs among our pre-college population? And if we could know, does it help us in some particular ways in our work?

Having taken the journey, I have had to conclude that collecting data one can call definitive has proven to be elusive at best. Nonetheless this was a fascinating exercise, even fun at times, with some hunches confirmed, some directions we need to think about made clearer. We'll look at the numbers together, and then I'll share my thoughts about them with you while you draw your own conclusions.

Of all our presenting associations, the League of American Orchestras is our largest, oldest, and most sophisticated at collecting and interpreting its data.

I decided to compare the 2000-01 season with 2005-06, the most recent for which LAO publishes its statistics, because what happened is that audience attendance declined by 10% in 2001-02, and then stayed flat through '05-06. For a penetrating analysis of attendance, revenues, and various other LAO data, I commend to you the excellent article by UT-Austin's Douglas Dempster, published by the Symphony Orchestra Institute. The LAO website also has data posted for each year since the 2001 season.



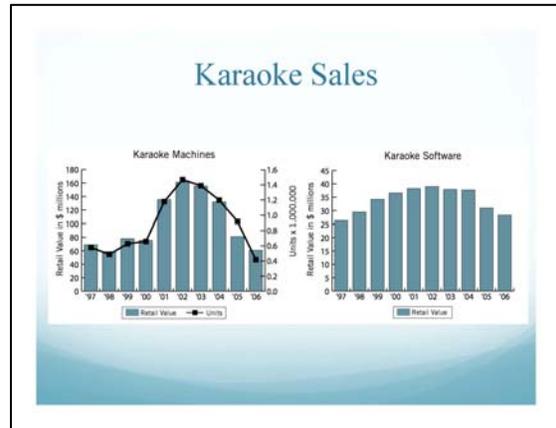
Here's a look at Opera America. I was fascinated to learn that the Metropolitan Opera accounts for fully 25% of all financial activity among the 110 companies reporting. I wish I could report on Chamber Music America, because they count over 8000 members, but they are not set up to collect data at this point.

I had the most fun leafing through the "Global Report" published by NAMM, formerly the National Association of Music Marketers. From it, you can learn about sales trends compared to the prior year dollar amounts,



and percentage gains or declines by individual instrument categories.

For example, here is the sorry plight of karaoke sales.



Yet printed music sales, surprisingly, were on the increase.



Of particular interest to us are the data on school instrument sales. Here's woodwinds, where you can see, unit sales are up and revenues are down, indicating the cost of the instruments is lower.



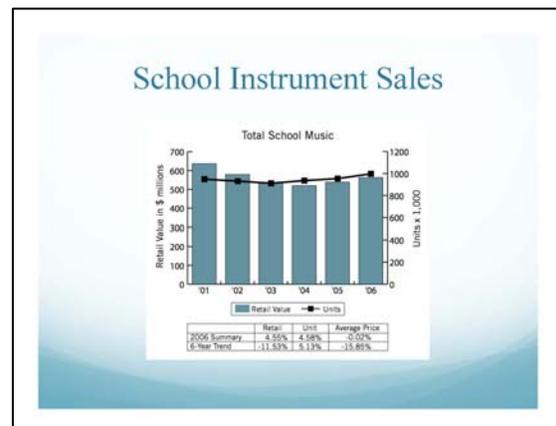
Brass, the only category showing a decline both in instruments sold and revenues;



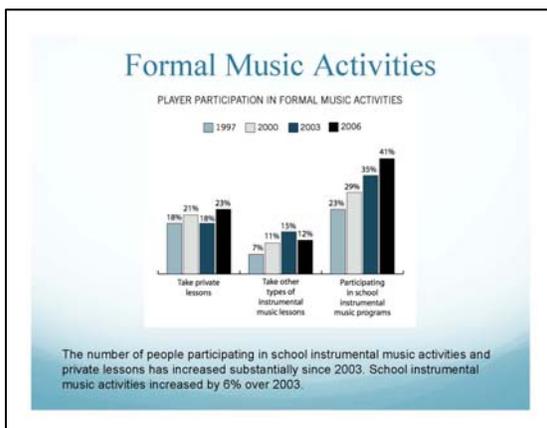
Strings;



Percussion;



School purchases over all.



The most significant data for our purposes though, is a study NAMM commissions every three years from the Gallup Poll, taken to measure what they call “attitudes towards music.” In the bar graph on the right, Gallop tracks an increase in participation in instrumental music programs from 23% to 41%; in the bar graph on your left, the percentage of students taking private lessons has increased from 18% to 23%.

So much for the LAO, Opera America, CMA, and NAMM, what RAND calls the “supply side.” Here’s the other half of the equation. The RAND study makes the valid and important point that you create “demand” for this arts “supply” when organized and systematic education programs are available in them. I am particularly indebted to Michael Blakeslee and Sue Rarus of MENC and Gary Ingle of MTNA for providing important insights and, I regret to say, more data than I have time to share with you this morning. From this view of MENC, MTNA, Community Music Schools and our own Preparatory divisions, we get a sense of the number of teaching professionals working in the K-12 system, although we understand that total numbers of independent, community school and prep division teachers are not tallied. And only HEADS reports the number of students being taught, though not for our prep divisions.

Music Education

Organization	Member Units	Teachers
MENC: Music Teachers (all)	N/A	130,000
MENC: Music Teachers (certified)	N/A	64,000
NASM Preparatory Divisions	137	N/A
Community Music Schools	313	N/A
MTNA Members	N/A	17,000
Youth Symphonies	400	400

US Census Figures

Students Enrolled in Grades 1-12	49,800,000
Students Enrolled in Instrumental Music (41% of total)	20,500,000
Students Enrolled in Choral, Vocal, or Other Music	4,500,000
Total Enrolled in Music (50% of total)	25,000,000
Other Arts Experiences	??????

Here’s my own attempt to do the numbers. The US Census reports that in 2005-06, 49.8 million students were enrolled in grades 1 through 12. Taking that 41% of school children the Gallup Poll tells us are enrolled in instrumental school music, and adding a conservative guesstimate of 10% for choral, vocal or other music, since NAMM is tracking only instrumental sales, I calculate a total of 25 million studying or making music in grades 1-12, half the total school population.

Yet, half the teachers are not certified, nor do we know how many of them are spread so thin among multiple schools or classes that they can’t provide a meaningful educational experience. The same might be said of the independent music teacher; there are thousands who choose not to take membership in MTNA, so we can’t count them all, and the range of expertise among them is huge. Nonetheless, the Gallup Poll you saw earlier indicates that 23% of all K-12 students are taking private lessons; these are also the students most likely to be engaged with a youth orchestra, an MTNA member teacher, or community or preparatory school program in addition to participation in a school music program. Beyond this privileged core of 11.5 million students engaged in relatively intensive music study, it is not at all clear how many of the 25 million are receiving a systematic, sequenced experience in music,

Quality of Learning Experience

Organization	Teachers	Students
MENC Estimate	130,000	
MENC Estimate-Certified	64,000	
Total Students Enrolled in 1-12		49,800,000
Estimated Total no. Music Students		25,000,000
Students Taking Private Lessons (23% of total enrolled)		11,500,000
Estimate of students with no music learning experience		25,000,000

especially given the fact that fully half of the K-12 music teachers do not have certification. AND, it appears that 20 to 25 million students in our grades 1-12 group have no access to music education at all.

The HEADS summary indicates that NASM schools graduate about 20,000 students each year, of whom 5000 are prepared to begin or continue a K-12 teaching career.

Music in Higher Education

Organization	Member Units	Faculty	Music Students	Total Music Graduates	Total Music Education Graduates
NASM (HEADS)	610	10,300	110,000	20,000	5,000
Non-NASM Inst.	600 (approximate)	N/A	N/A		1,000 (est.)

Total

Engagement with Music in the U.S.

40-50 Million People,
or 15% of the U.S.
Population

So, here's another bottom line. Adding together all of our music professionals, audience attendees, presenters, volunteers, teachers and students, and allowing for some overlap among these populations, we probably have in the neighborhood of 40 to 50 million Americans engaged with music. The level of engagement varies widely, of course, but amounts to 15% or so of the US population, at least as the RAND Corporation defines music in its study. I know, I know, I'm ducking a huge question here about

just what genres, exactly, constitute our music, but that is a conversation for another time, and besides, being more inclusive than you imagine the definition to be only increases the number of Americans involved.

The RAND tells us American engagement with music is in decline. Knowing what I now know about the data gathering systems we have, I'm not so sure they can tell. For me, 50 million Americans engaged with music is a start, a darn good one.

One thing we can be sure about is the quality. American presenting organizations, performing at the highest level of quality they've ever been, also devote more effort and care into their advocacy, outreach, marketing, and fund-raising, than ever before. It's reflected in the kinds of music they make and where to which audiences they're making it.

League of American Orchestras

Performances 2005-06

- 17,852 Education
- 7,481 Classical
- 2,375 Pops
- 2,055 Community Engagement
- 1,818 Chamber/Ensemble
- 6,531 Other Concerts (including choral, opera, ballet, summer, family, and festival events)

Such thought and practice can make it easier for our side, the "creating demand" side to be more effective, because I believe they understand that while outreach can provide that inspirational moment for a few and an arts attendance habit for the many, in partnership with our educational programs together we have the ways, the means, and the expertise to turn inspiration into achievement and access into involvement. The optimist in me tells me that when it comes to music in education, our side of the equation, we too are better than we've ever been. We've never had more students more accomplished when they start with us. Taken as a whole, our faculty are

better prepared than ever before to work with our students in the real world of the 21st century. And, as for that supply-demand paradigm, we in higher education do it all: we serve as cultural centers for our communities, we provide outreach experiences that inspire, develop teaching, share knowledge, and foster arts education for our geographical spheres of influence.

But we also must face the challenges these data imply. We're reaching 25 million, half of our K-12 students. Twenty-five million to go? Honestly, I don't think so. First of all, the visual arts, theatre, and dance can and should meet many needs and aspirations for creative expression. But it doesn't hurt to also recognize we can do more. In a variety of ways we already have embraced the problem of access to a music education for our pre-college students as our problem too. For those who can afford to pay, nearly 140 institutions within our membership have established preparatory programs; more will surely follow. For those who can't, even there we have some remarkable stories. Here are just a few examples:

- Robert Gibson reports that the University of Maryland established a mentoring program in its Music Technology Lab where they partner with two alternative middle schools to bring at-risk students to the Lab for instruction.
- Skip Snead tells me that the University of Alabama supports and provides staff for a K-4 at risk program in music for the Tuscaloosa City Schools.
- Indiana University started a program for first-grade students in one of the less affluent public schools in Bloomington, purchasing student violins for first-graders, and even a Wenger practice room.

These are just a few of the ways that our institutions are looking at the needs within their own communities, and meeting them according to their abilities.

Here's another quite direct challenge to us: though we graduate 5000 students each year in music education, the number of vacancies each year in K-12 is actually more than twice that many. When the supply of teachers is short it gives rise to alternative licensure, creating a worse problem. I especially commend to you Carolynn Lindeman's 2002 speech to the NASM Membership, "How can Higher Education Address the K12 Music Teacher Shortage?" Food for thought about what we can do to address this set of complex issues.

It's going to be up to us, individually and collectively, to work on all of this. It won't be easy, especially in the economic environment in which we find ourselves, but clearly we have the capacity to make a difference if we think about these things individually and work on them collectively.

Before I close, I want to address for a moment the current economic climate, and acknowledge that it certainly has or will soon spell difficulty for many of us, and just wanted to remind you that we're in this together; we can share ideas and strategies that will help us get through some difficult budget cuts, small or non-existent faculty raises, new programs or new facilities put on hold. This Association, now 84 years old, was founded in 1924, just 5 years before the market crash and the great depression. During, and since that time, our membership has worked its way through several of these very tough economic cycles. Through them all, we have turned to one another for advice, support, consultation and commiseration. And, our NASM standards will continue to help us ensure that our programs can maintain their integrity and allow us to be strategically positioned so that when things turn around, we can meet our aspirations for the next level of excellence. Think how far over the years we've come, as a membership; think how your institution has developed, despite these fluctuating financial cycles. In closing, I encourage you to

hold fast to your plans, your dreams, and your ambitions. Above all, remember that our magnificent music, in the best of times, in the worst of times, is there for us always, providing both solace and inspiration. Truly, truly, as we approach this season of Thanksgiving, if we think about our music, when we consider the wonderful kids in our programs, with all their enthusiasm, talent, and potential, when we realize, even in this challenging time the incredible bounty that is ours in this wonderful country, we still have so very much to be thankful for.