bournemouth symphony orchestra





SOUND DIPLOMACY











BOURNEMOUTH SYMPHONY ORCHESTRA

Economic & Social Impact

Executive Summary | October 2026



FOREWORD

Bournemouth Symphony Orchestra is unique. The only professional symphony orchestra in the UK not based in a city, the BSO exists to bring music into people's lives across 10,000 square miles of the South and South West of England.

Alongside some major metropolitan hubs, this remarkable region is also characterised by a rural landscape where access to culture is severely limited, and social isolation is a huge challenge.

BSO has a distinctive way of working, which aims to make the life affirming brilliance of our extraordinary musicians as accessible as possible, whether in a concert hall, village hall, school, at home, in a care home, hospital or community setting. We believe that the chance to engage with world-class culture should be accessible to all, not just those in the major population centres. At the heart of all of this is the transformative power of music itself; the extraordinary experience of hearing and making music together, and the connection that can create between people.

This vital new report shows how the BSO is an economic engine, turning local investment into regional return. It shows our contribution to the social fabric of the communities we serve, how we connect people, support their wellbeing, how we ignite potential in the young and create a great place to work.

At the heart of the BSO is an extraordinary group of people, passionate about what we do and committed to making a difference. We also could not exist without the support and belief of an equally extraordinary network of partners, funders, supporters, and advocates. To all of them, we offer our sincere thanks for their belief in our mission.

The BSO was founded in 1893 in the young town of Bournemouth, through a belief that music not only brings local communities together but contributes to economic and societal growth. More than 130 years later, that belief remains at the heart of who we are. I am hugely grateful to the team at Sound Diplomacy for creating this report, which powerfully demonstrates what is possible when a world-class orchestra puts its region and its communities at the heart of everything it does.

Dougie Scarfe OBE DL
Chief Executive

1. INTRODUCTION



Bournemouth Symphony Orchestra (BSO) is one of the UK's most celebrated professional orchestras, with a proud history of bringing the power of music to communities across the South and South West of England.

With its home base at Lighthouse, Poole, the BSO holds residencies in Bristol, Exeter, Portsmouth, Southampton and Yeovil, making it the largest performing organisation in the South West and serving one of the UK's biggest and most diverse regions.

Nationally and internationally recognised, the BSO is committed to placing culture and community at its heart. Through BSO Participate, the Orchestra extends its reach far beyond the concert hall, delivering events across more than 200 locations in 23 Local Authority areas, ensuring that the transformative power of music is accessible to as many people as possible.

This study measures the economic and social value impact of the BSO with the aim to provide the organisation with a robust, evidence-based analysis of its contributions across the South West. This report is designed to be an essential resource for the BSO as it enters a critical phase of business planning, enabling the organisation to articulate its value to funders, donors, policymakers, and community stakeholders, supporting sustainable growth and long-term project delivery.



ABOUT
Sound Diplomacy

We are a global music, culture and creative economy consultancy. We use research and data to demonstrate the economic and social value of the creative industries, and provide strategic planning for cities, places and communities to maximise their impact. Our work unlocks new opportunities, fosters sustainable development and builds more dynamic, inclusive environments.

Composed of consultants and experts worldwide, Sound Diplomacy has advised over 190 clients in over 35 countries, including the public sector such as cities, municipalities, governments, and international governmental organisations, and private entities in the real estate, investment and cultural and creative sectors.

We are creating the global standard demonstrating how investing in culture – and the people who make it – is the best path to economic and social growth. We provide world-class data and evidence so that culture, in all its forms, is incorporated into how we build, govern, and make decisions to invest in ourselves and our communities.

Sound Diplomacy owns and operates world-leading business conferences on music, culture and policy and produces insights and thought leadership with renowned partners.



ABOUT
Bournemouth Symphony Orchestra

One of the UK's best-loved orchestras, Bournemouth Symphony Orchestra (BSO) is known for championing the role of culture in people's lives. Based at Lighthouse, Poole, the Orchestra is resident in Bristol, Exeter, Portsmouth, Southampton and Yeovil, and performs in towns and villages across the region. It is the largest performing organisation in the South West of England, serving one of the biggest and most diverse regions in the UK.

As a **touring orchestra**, around 60% of the BSO's symphonic performances take place each year beyond its home in Poole, Dorset – and its acclaimed live broadcast **Digital Concert series** connects an estimated annual audience of 30,000 online. Celebrated for its award-winning **BSO Participate** programme, the Orchestra brings the benefits of music into schools, hospitals, care homes and community settings, creating more than 58,000 meaningful musical experiences last year alone.

Founded in 1893, by the pioneering leader Sir Dan Godfrey, the BSO combines more than 130 years of musical heritage with a commitment to innovation: under the artistic direction of **Chief Conductor Mark Wigglesworth,** it continues to champion today's artists and composers while remaining true to its unique regional mission.

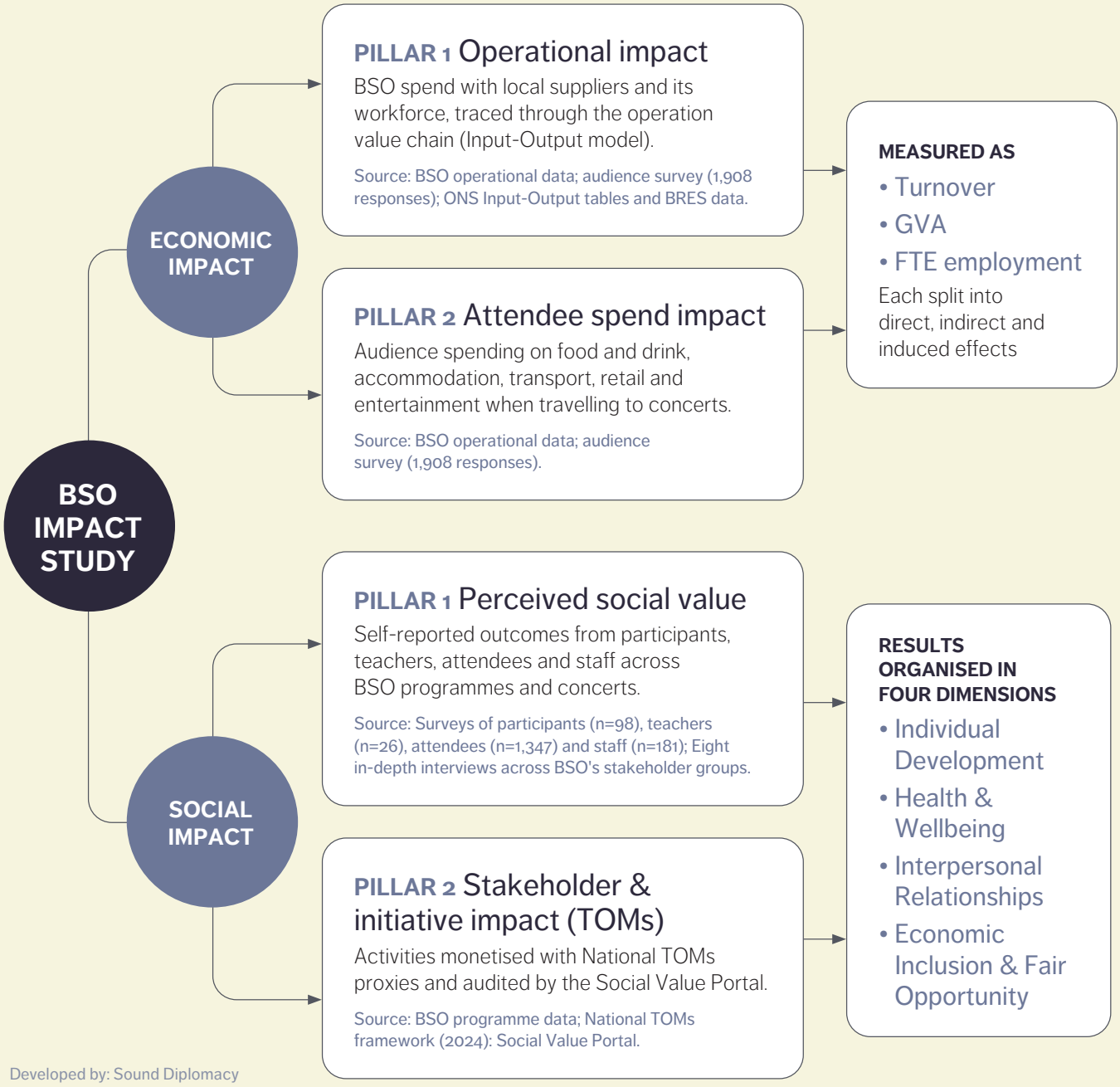
A **National Portfolio Organisation** of Arts Council England, the BSO is a registered charity whose work is made possible through public investment and the generosity of individual supporters, corporate partners, charitable trusts and foundations, and gifts in wills. Together, they enable the Orchestra to enrich lives, strengthen communities and make exceptional music accessible to all.



1.1 METHODOLOGY *in brief*

The BSO Impact Study measures value across two impact areas, Economic Impact and Social Impact, each built on two complementary pillars, shown in Figure 1. These independently converge on the same conclusion about the orchestra's value.

Figure 1. **BSO Impact Study Methodological Structure**



Developed by: Sound Diplomacy

Throughout, we heard from four groups whose perspectives run across this report:

- **Concert audiences**
- **Participants** in BSO's community programmes (or their proxies)
- **Teachers** reporting on outcomes observed in their classes
- **BSO staff**, including freelance musicians, employed orchestra musicians, and administrative staff.

The TOMs[1] valuation follows the framework's principles of additionality, attribution, no double-counting and deadweight discounting. Fuller methodological detail is provided in the Full Report.

1.2 **THEORETICAL** *framework*

Evidence consistently shows that both active and receptive engagement with music delivers measurable benefits for cognition, mental and physical health, social connection and inclusive opportunities, providing a robust foundation for the outcomes observed across BSO's programmes.

The following synthesis of evidence from various sources demonstrates the multifaceted developmental, economic and social impact of music, providing evidence to support the four dimensions of the BSO value assessment. Drawing on peer-reviewed studies and institutional research, it substantiates the four dimensions through which BSO's impact has been measured: Individual Development, Health and Wellbeing, Interpersonal Relationships, and Economic Inclusion and Fair Opportunity.

INDIVIDUAL DEVELOPMENT

Music engagement builds transferable life skills in young people. Di Stasio and Manuguerra (2024) found that participation in a classical music ensemble strengthened adolescents' self-perception of core life skills, including confidence, communication and self-management. These outcomes align closely with BSO's youth and education programmes and point to clear scope to deepen this dimension further.[2]

Structured music learning supports cognitive and educational development across the lifespan. Vernia-Carrasco et al. (2024) show that music education generates cognitive, emotional and social gains for learners of all ages,[3] while Fancourt et al. (2021) link instrument playing to improved cognitive health in older adults, reinforcing the value of BSO's curriculum and skills-based work.[4]



HEALTH AND WELLBEING

A large evidence base confirms music activities improve health and wellbeing. Fancourt et al.'s (2021) scoping review of 63 studies covering 6,975 participants across nine databases concluded that music activities benefit health and wellbeing for people of all ages and backgrounds, operating through both psychological (emotional, cognitive) and social mechanisms.[5]

Music produces a measurable, physiological stress-reducing effect. A review of 44 studies found that 13 of 33 stress biomarkers (including cortisol, blood glucose and immune measures) changed in response to listening to music (Finn and Fancourt, cited in Fancourt et al. 2021),[6] while a meta-analysis of 47 studies reported a medium-to-large effect of music on stress-related outcomes (de Witte et al. 2022).[7]

Music is widely used to regulate mood and reduce depression. One study found that 96% of participants used music to regulate their emotions, and a controlled study reported that 30 minutes of daily music listening over 13 weeks significantly lowered depression scores (We Are All Music Foundation 2025).[8]

Music can be protective for mental health at population scale. Following the release of a suicide-prevention song, calls to a national crisis lifeline rose by almost 30% and researchers estimated a reduction of as many as 250 suicides. This is evidence of music's power to carry messages of hope and resilience (We Are All Music Foundation 2025).[9]

In clinical settings, music supports recovery and symptom management. Health providers report that music therapy reduces anxiety, pain and distress for cancer patients (Mount Sinai; Cancer Research UK), [10] [11] aids motor and speech rehabilitation after stroke (Flint Rehab)[12] and strengthens recovery from addiction, directly echoing BSO's Music in Hospitals programmes, and Recovery and Wellbeing Orchestras.





INTERPERSONAL RELATIONSHIPS

Live concert attendance enhances wellbeing and cultural connection. A European research project found that attending classical concerts improved students' wellbeing and sense of connection (Petrović et al. 2020),[13] supporting the central role of BSO's live programme in fostering shared experience.

Group music-making builds social connection, belonging and identity. Fancourt et al. (2021)[14] identify bonding, inclusion and shared identity as central mechanisms of music's benefit, showing that group singing and ensemble playing give participants access to social support, meaning and self-esteem.

ECONOMIC INCLUSION AND FAIR OPPORTUNITY

Music participation advances equity, inclusion and access. Reviewing the wider evidence, Concina and Biasutti find that music education and participation promote social inclusion, equitable access and community cohesion,[15] underpinning BSO's role as an inclusive employer, local procurer and champion of fair access to culture.

The benefits examined under each dimension in the full report are summarised below.

Table 1. **Dimensions of social value analysed in the literature review**[16]

DIMENSION	DEFINITION	BENEFITS ANALYSED IN THE REPORT
Individual Development	The acquisition and enhancement of educational, cognitive, emotional and professional capabilities that enable individuals to realise their potential and progress in learning, work and life.	• Educational and cognitive skills: academic and musical development, concentration, memory and attention, and academic motivation • Emotional skills: confidence, self-esteem and resilience • Acquisition of new creative and technical skills • Professional and career development: career education, work experience and talent progression.
Health and Wellbeing	The state of physical, mental and emotional wellbeing that underpins a good quality of life, including the capacity to manage stress and adversity.	• Improved mood and reduced stress • Enhanced mental and emotional wellbeing • Improved quality of life • Increased resilience • Improved physical health, including outcomes of clinically supported programmes delivered with NHS and third-sector partners.
Interpersonal Relationships	The development of social skills and meaningful connections that strengthen relationships, foster a sense of belonging and cultivate community cohesion.	• Strengthened connections with family, friends and peers • A sense of community pride and belonging • Participation in shared cultural experiences • Social inclusion for those facing barriers to cultural engagement.
Economic Inclusion and Fair Opportunity	The organisation's contribution, as an employer, purchaser and local institution, to equitable access to employment, inclusive procurement and fair working practices within the regional economy.	• Local and inclusive employment, including recruitment of people with disabilities, women and ethnic minorities, and diverse representation in leadership • Inclusive procurement with local SMEs and voluntary, community and social enterprises (VCSEs) • Fair work practices: prompt payment, Musicians' Union recognition, and Good and Fair Work standards • Organisation-wide Equality, Diversity and Inclusion training.

2. **BSO IS MORE** *than an orchestra*






BSO creates value in every interaction this is truly impact by design.

One orchestra. £11.4 million of economic value, £17.8 million of social value, and a difference felt in concert halls, classrooms, hospitals, and care homes across the South West.





BSO is an economic engine. It turns local investment into regional return.

- It generated a total impact of £11.4m turnover, £6.2m GVA and 215 jobs in 2025. For every £1 spent locally, £2.29 was generated in the rest of the local economy.

BSO is part of a social fabric.
Live music is a source of individual and community development.

- A total of £17.8m of social value was generated in 2025, spanning cultural participation, health and wellbeing, personal development, and the BSO's role as a fair and inclusive employer. This is more than twice the BSO's operational spend of £8.2m, meaning that for every £1 the BSO spends, it generates over £2 in social value.

BSO is a connector of people. A shared concert is one of the most powerful ways people come together.

- 59% of audiences said taking part strengthens their ties with others, and 74% felt greater community pride.
- 91% of audiences believe South West culture is world-class.

BSO is a great place to work. How it employs and buys matters as much as what is performed.

- £3.9m of social value was generated through fair, local, inclusive employment.
- 97.1% of staff musicians agree or strongly agree the BSO Committee is active and supports a productive and successful working environment.
- 100% of administrative staff understand and can access their benefits.
- 95% of freelance musicians say they are proud to work here.





BSO is an inclusive healer beyond medicine. It works hand-in-hand with patients, letting live music heal where medicine alone cannot, and reaches those who face the most barriers and delivers for them most of all.

- 93% of participants say participating in a BSO programme improves their mood; 96% of audiences say BSO makes them feel happier; and 88% of teachers say attending a BSO programme makes their class feel happier.
- 79% of participants in clinically supported programmes agreed that BSO improves their quality of life; and 67% reported that BSO programmes help them build their resilience.
- Two in five participants have additional needs (including a disability, mental health conditions, experience of addiction, long-term illness, neurodivergence, or sensory impairment) and report equal or greater benefit than the rest of participants.

BSO is where potential ignites. It meets young people early, it shows them what's possible and it builds skills that reach far beyond music.

- Disabled young musicians in the National Open Youth Orchestra (NOYO) discover there is no limit to what they can achieve.
- 100% of teachers observe at least one cognitive skill gain in their class and improvements in their students' musical skills.

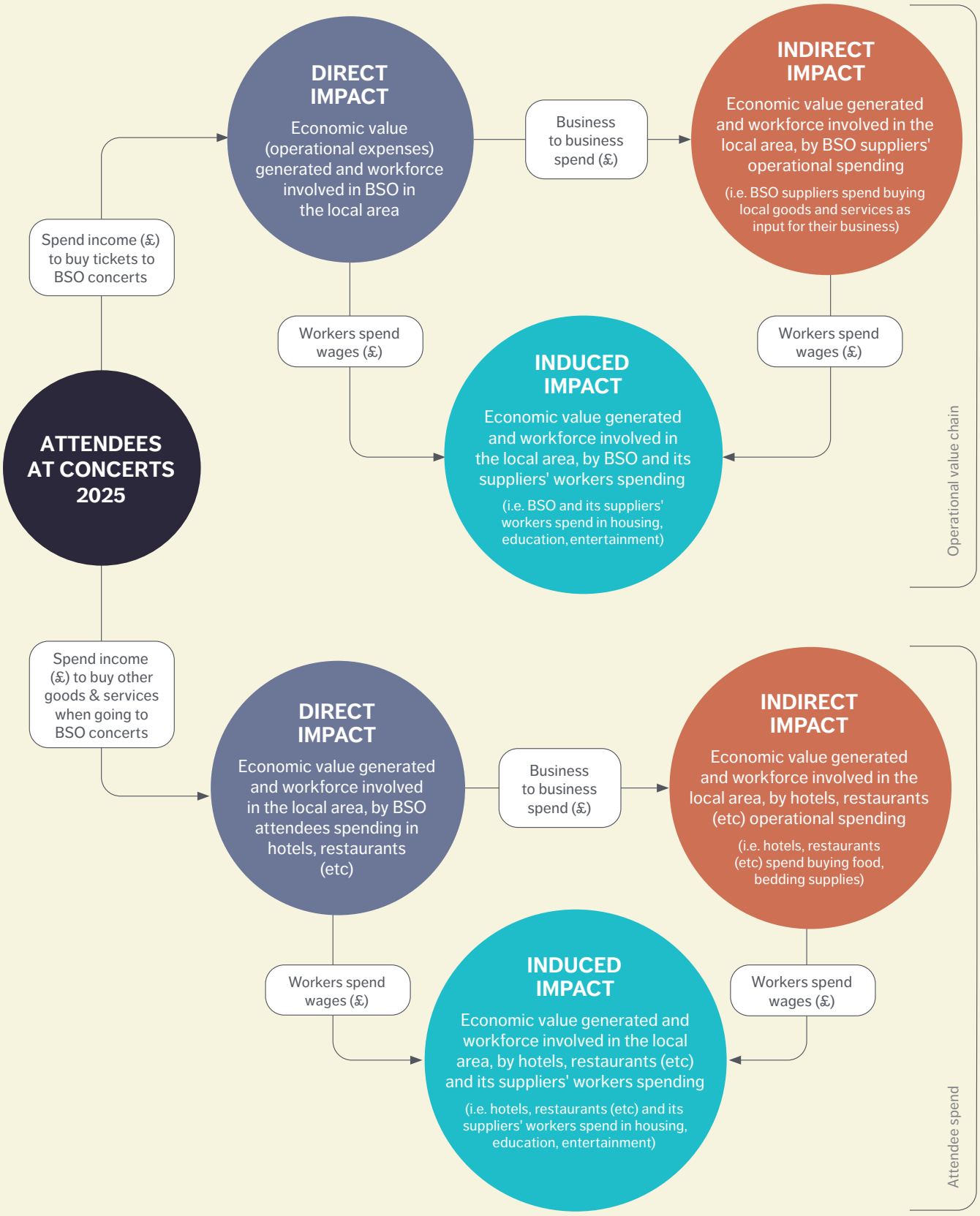
3. **ECONOMIC** *impact*



BSO is an economic engine.

This section quantifies the BSO's economic footprint in 2025 under the two pillars set out in the methodology: operational impact (BSO spend with local suppliers and its workforce, traced through the operation value chain) and attendee spend impact (audience spending on accommodation, food, transport, retail and entertainment when travelling to concerts). Each pillar is measured as turnover, GVA and FTE employment, split into direct, indirect and induced effects.

Figure 2. **Economic Impact flow:** BSO operation and attendee spend

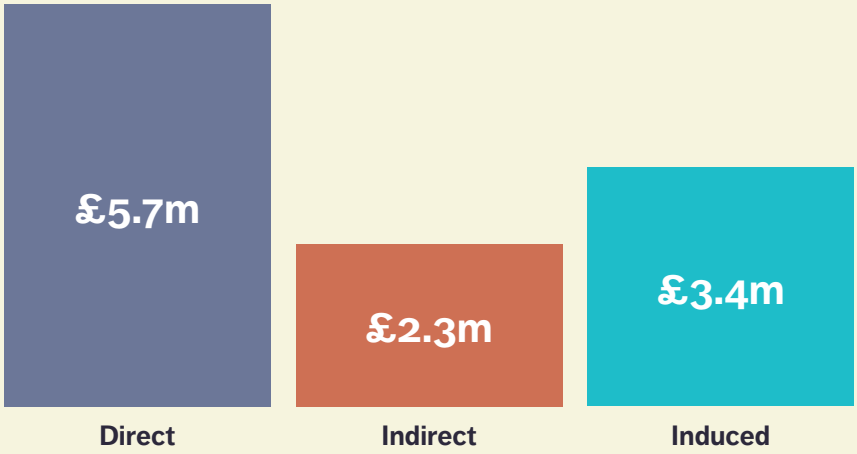


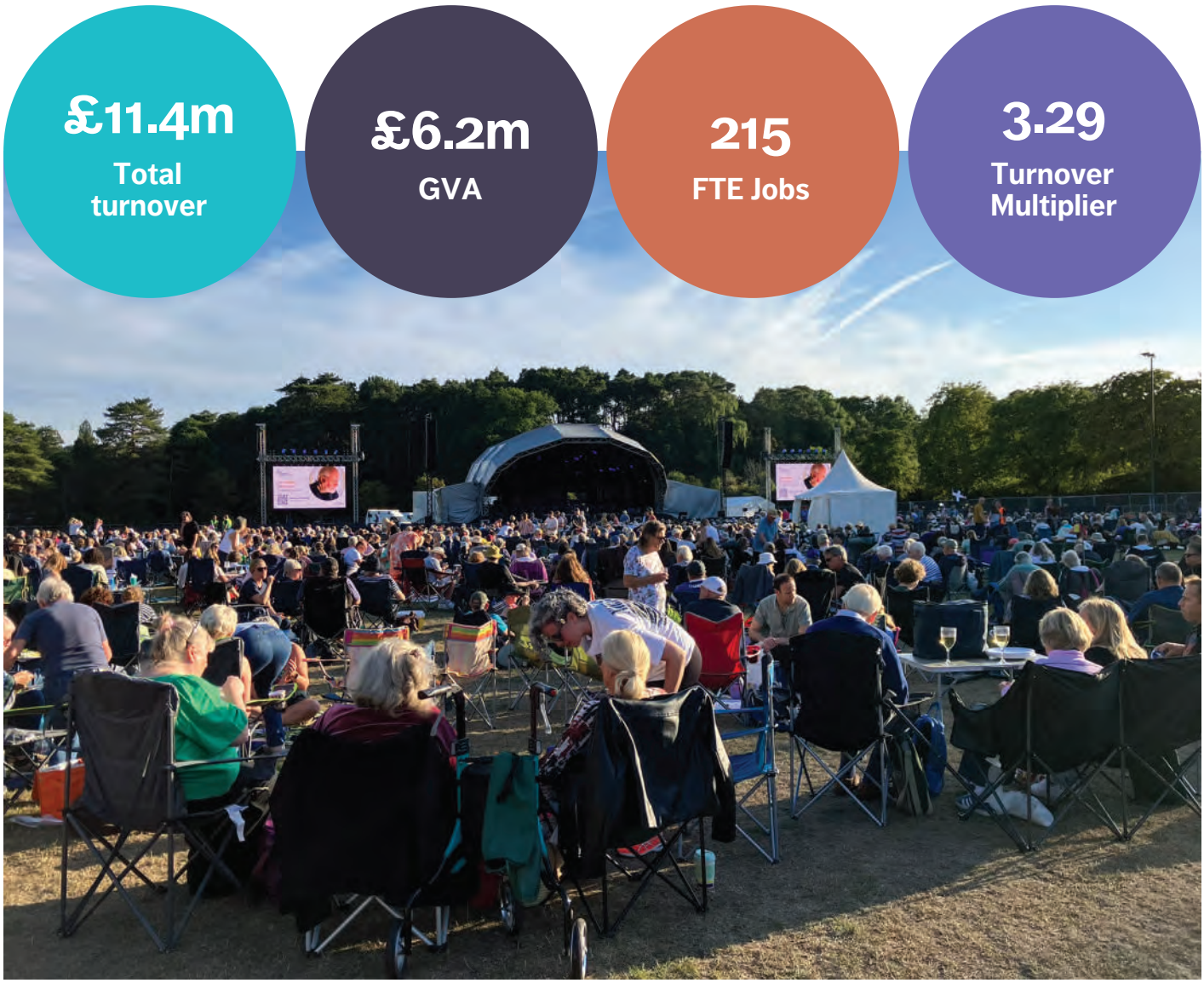
Developed by: Sound Diplomacy

Every performance, whether in major cities, rural communities, care homes, hospitals or village halls, generates turnover and GVA, and supports employment among local suppliers and the wider industries where those wages are spent. Audiences add a second layer of value, spending on accommodation, food, retail and transport when they travel to a concert. This section quantifies both.

An orchestra with a £3.4 million local operating budget[17] turned that investment into £11.4 million of impact across a region of more than 10,000 square miles.

Figure 3. **Economic impact by effect (direct, indirect, induced)** – total turnover, 2025





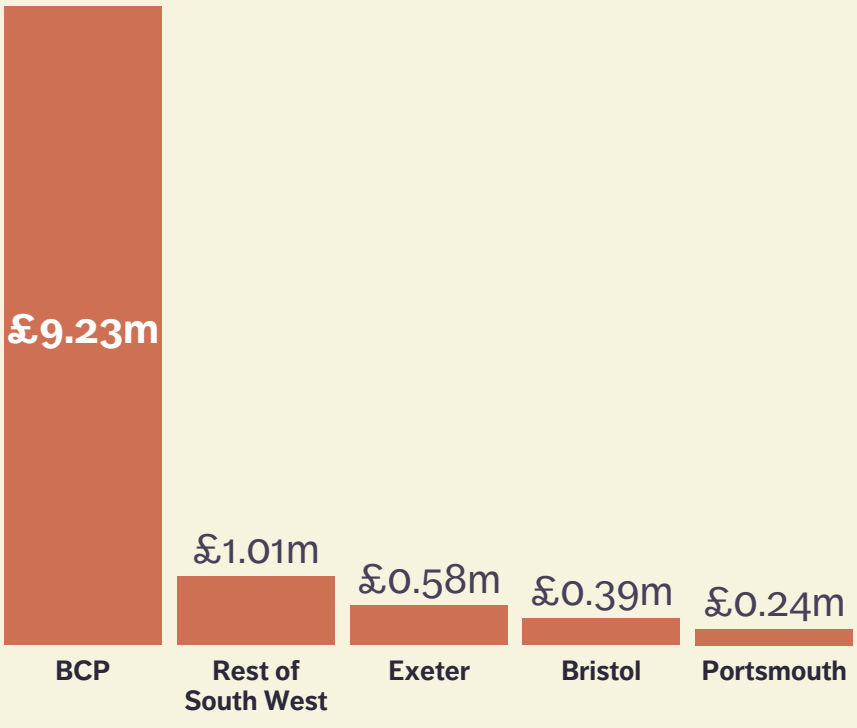
A powerful multiplier. For every £1 the BSO spent in local economies, £3.29 of turnover was generated in total, as money circulated through supply chains, household incomes and audience spending.

A significant regional asset. BSO delivered 129 events attracting over 77,000 in-person attendees, more than half of whom (51%) travelled from outside the host town, alongside 19,256 digital attendees across 18 digital concerts. Impact reached all nine local areas, from Chichester and Portsmouth to Truro.

Value that stays local. Operational activity alone (£3.4 million spent directly with local suppliers) generated £6.7 million in turnover, £3.7 million in GVA and 166 FTE jobs across the region.

Most of the total effect, 91.2% (£10.4 million) of turnover and 95.8% of jobs, is generated in Bournemouth, Christchurch, and Poole (BCP), Portsmouth, Exeter and Bristol, with BCP being the largest single contributor at £9.2 million in turnover, £5.0 million in GVA and 112 FTE jobs. Beyond these hubs, the orchestra's footprint spreads across the rest of the South West, contributing a further £1.0 million in turnover and 9 FTE jobs: a meaningful collective footprint that underlines the BSO's role as a genuinely regional economic asset.

Figure 4. **Economic impact by performance area** – total turnover, 2025



		BCP	PORTSMOUTH	EXETER	BRISTOL	REST OF SOUTH WEST
		£9,234,747	£240,746	£577,353	£385,507	£1,011,170
Turnover (£)	Direct	£4,616,830	£124,169	£301,076	£173,156	£493,447
	Indirect	£1,873,532	£46,937	£111,348	£84,709	£192,014
	Induced	£2,744,385	£69,639	£164,929	£127,643	£325,710
		£5,019,505	£123,940	£313,163	£195,945	£538,905
GVA Gross Value Added (£)	Direct	£2,499,579	£65,625	£158,660	£89,773	£261,009
	Indirect	£941,799	£21,273	£54,791	£37,618	£91,940
	Induced	£1,578,127	£37,042	£99,712	£68,554	£185,956
		112 FTE	29 FTE	32 FTE	33 FTE	9 FTE
Employment Full-Time Equivalents (FTE)	Direct	59	15	17	17	6
	Indirect	24	7	8	8	1
	Induced	29	7	7	8	2



AUDIENCES AS AN ECONOMIC ENGINE

Spending by BSO audiences created £2.23 million in direct turnover and, with supply-chain and induced effects, £4.67 million in total turnover, £2.48 million in GVA and 49 FTE jobs. On average, non-local attendees spent around £60 per visit, half of it on food and drink, with the rest split across accommodation, local transport, shopping, entertainment and BSO merchandise. Crucially, this is spending that would largely not occur without the concert: as one long-standing patron put it, following the orchestra to Truro means three nights of hotels, restaurants and "things we do in between".

Figure 5. **BSO attendee spend in the local area,** per type of spending, 2025

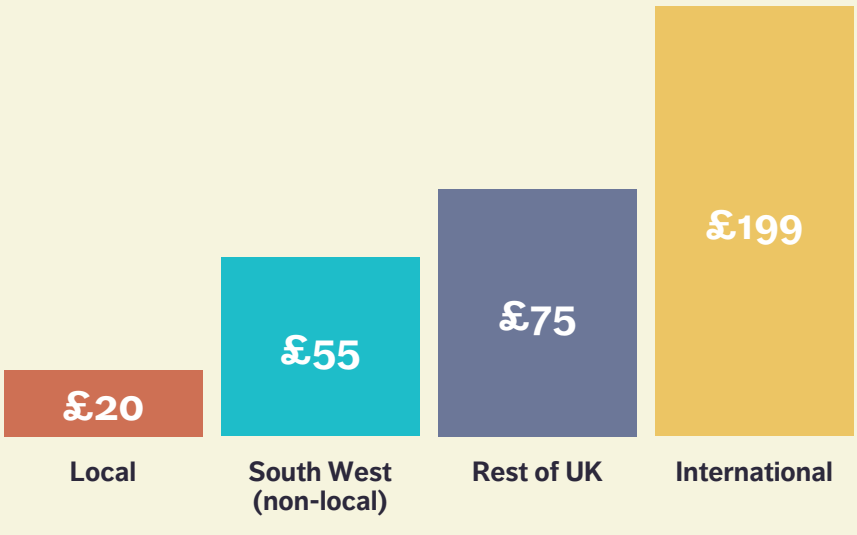


Developed by: Sound Diplomacy

The further audiences travel, the more they spend and the longer they stay. Non-local visitors from within the South West spent around £55 per day compared to £20 by locals; visitors from the rest of the UK spent £75. This is the economic signature of a cultural draw: an orchestra that pulls visitors, and their spending, into the region's towns and cities.

For every £1 the BSO spends locally, £3.29 flows through the regional economy – a return that few investments of any kind can match.

Figure 6. **Average daily spend per attendee** by place of residence, 2025[18]





4. SOCIAL IMPACT

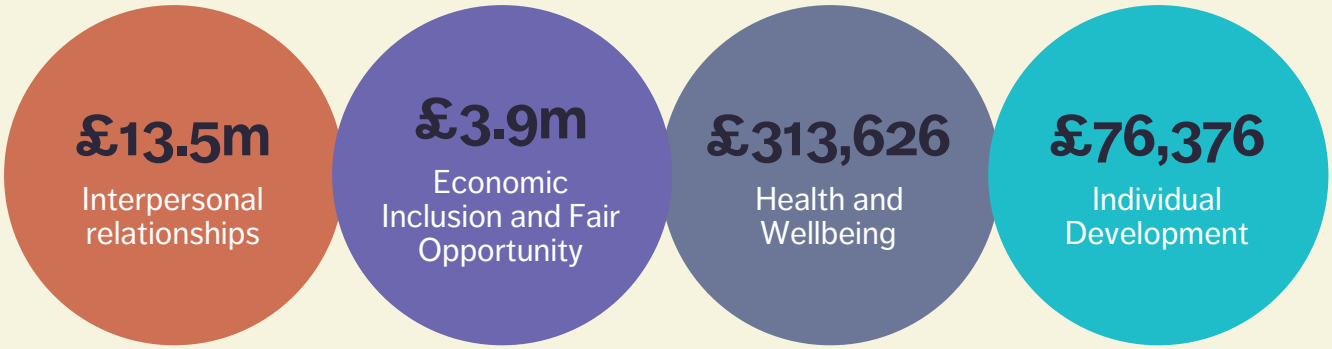
BSO is part of the social fabric.

This chapter presents the BSO's social value under the two pillars set out in the methodology (Section 1.1): perceived social value, drawn from self-reported survey outcomes across participants, teachers, attendees and staff, and monetised social value, calculated using the National TOMs (Themes, Outcomes and Measures) framework and audited by the Social Value Portal. Both pillars are organised into the same four dimensions (Individual Development, Health and Wellbeing, Interpersonal Relationships, and Economic Inclusion and Fair Opportunity) and are explored together, dimension by dimension, in the sections that follow.

Beyond the balance sheet, the BSO generated £17.8 million of monetised social value in 2025 through the TOMs framework, a measurable impact on people's development, health and relationships. This figure only captures the pillar that can be expressed in monetary terms; perceived-value, reported throughout this chapter as survey findings, is deliberately not monetised, and should be read alongside the TOMs total rather than added to it.



Figure 7. **Social Value by Theme**
Total social value generated: **£17.8 million**



Developed by: Sound Diplomacy

The distribution reflects the BSO's primary role as a cultural organisation:

75.9% (£13.5 million) of total value is connected to **Interpersonal Relationships**, driven almost entirely by the BSO's concert programming, a shared cultural experience is one of the most powerful ways people come together.

Economic Inclusion and Fair Opportunity follows at **21.9% (£3.9 million)**, capturing the BSO's conduct as a local employer and procurer.

Health and Wellbeing accounts for **1.8% (£313,626)**, concentrated in clinically supported community programmes delivered with NHS trusts and specialist partners.

Individual Development, at **0.4% (£76,376)**, reflects tailored education, mentoring and career-development activity that reaches fewer people than the BSO's public-facing cultural offer, but delivers deep, targeted value where it is aimed.

4.1 INTERPERSONAL *relationships*



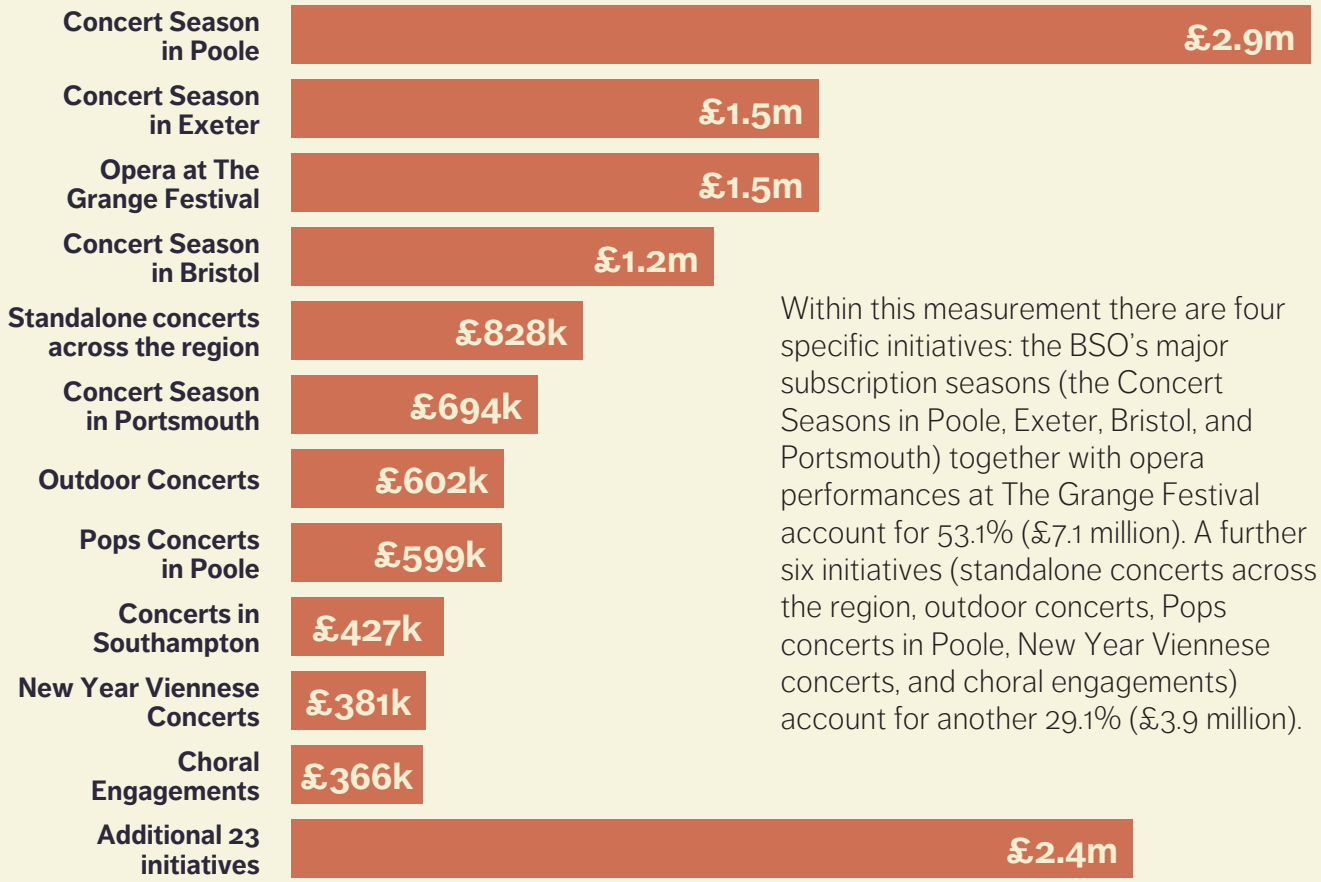
BSO is a connector of people.

Concerts and programming[19] are where the orchestra creates most of its social value, because a shared cultural experience is one of the most powerful ways people come together.

Table 2. **Monetised Value (TOMs): £13.5 million** (75.9% of total social value)

MEASURE	% OF DIMENSION	VALUE
Support for involvement in cultural events	99.1%	£13.4 million
Support for initiatives focused on strengthening community networks	0.8%	£115,669
Spend with local businesses who are also charities[20]	0.1%	£4,680

Figure 8. **BSO's Social Value for measurement NT110**
Support for involvement in cultural events, 2025[21]



Within this measurement there are four specific initiatives: the BSO's major subscription seasons (the Concert Seasons in Poole, Exeter, Bristol, and Portsmouth) together with opera performances at The Grange Festival account for 53.1% (£7.1 million). A further six initiatives (standalone concerts across the region, outdoor concerts, Pops concerts in Poole, New Year Viennese concerts, and choral engagements) account for another 29.1% (£3.9 million).

Developed by: Sound Diplomacy

DEEP DIVE
The Poole Concert Season



The Poole concert season is the BSO's largest single investment in music provision and the highest-value initiative in the dimension – primarily because it is the most resource-intensive: a full subscription season with salaried orchestral musicians, guest artists, venue costs and marketing across 24 separate concert days far exceeds the cost of smaller ensemble touring, outdoor festivals, or digital engagement.

This investment extends beyond Poole itself: the preparation, rehearsal and production work carried out there underpins the touring season in Exeter, Bristol and Portsmouth, which would not take place without it, and this is a further reason for Poole's higher costs relative to other initiatives.

Access pricing is embedded in the season's design. In 2025, children accessed concerts for £1 through the Kids for a Quid scheme (157 attendees); 333 school children attended through organised groups; 254 students purchased discounted tickets; 498 tickets were sold at 50% discount to people on state support; and members of the BSO's community programmes (Boscombe Community Orchestra, Somerset Wellbeing Orchestra, National Open Youth Orchestra) attended at no cost.

Staff hours
20,837

Social Impact generated
£2,918,414

Concerts
24

Composers/Guest artists
42 (12 nat.)
45 (16 nat.)

PERCEIVED VALUE

Concerts create belonging. 91% of audiences said attending a concert reinforced their belief that cultural events in the South West are world-class, and 74% of participants felt proud of their community as a result of taking part.

Connection is strongest for those who face barriers. Participants with additional needs scored higher than the overall sample on strengthened connections (3.87/5 vs 3.79/5), and Somerset Wellbeing Orchestra recorded the highest connection score of any programme (4.56/5).

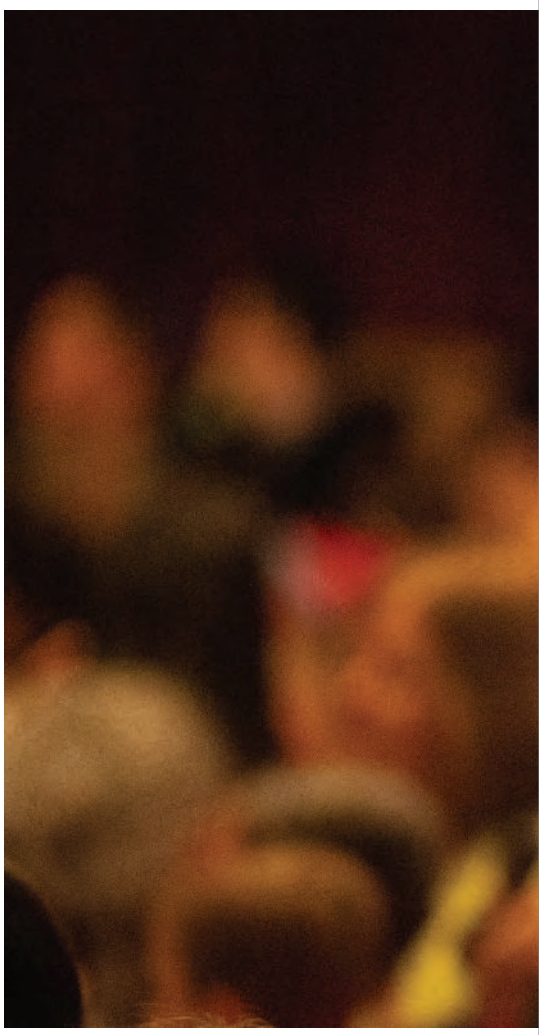
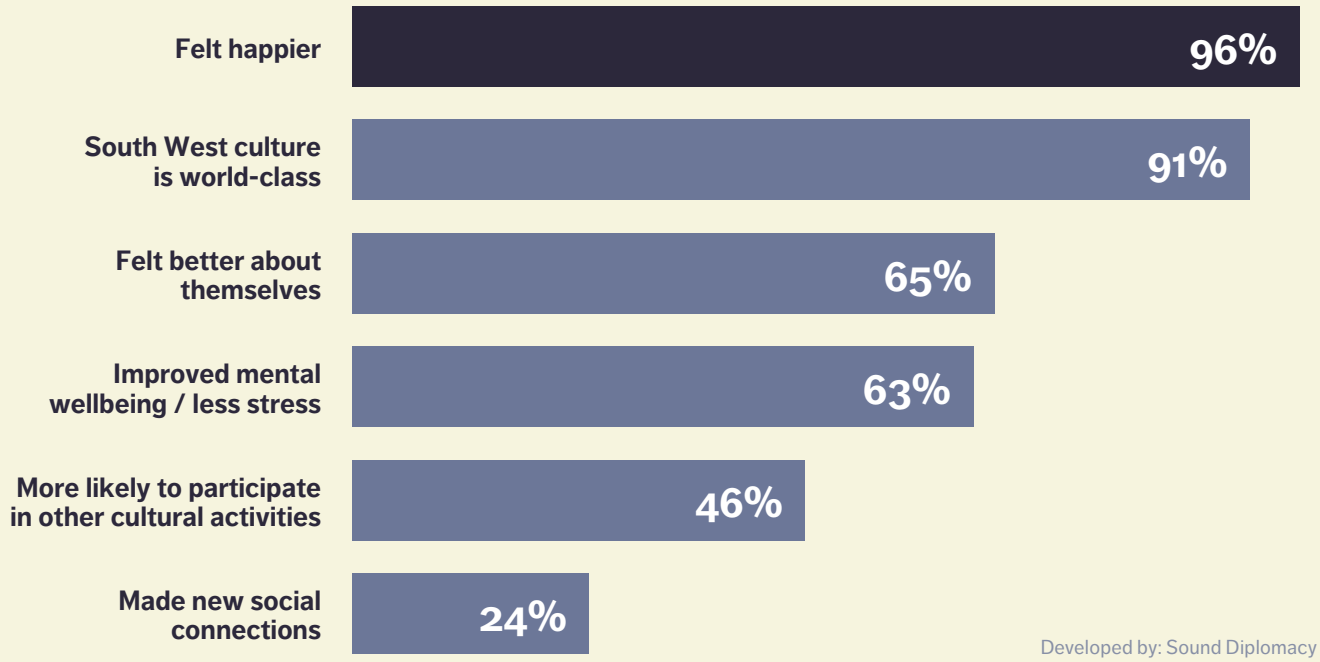


Figure 9. **How attending a BSO concert made audiences feel (n=1,347)**



Developed by: Sound Diplomacy



What each group told us:

Participants: 59% said taking part strengthens their ties with others, and 74% felt greater community pride.

Teachers: 77% agreed BSO programmes foster a sense of pride in their pupils' community.

Attendees: 46% said a concert made them more likely to join other cultural activities and 24% made a new social connection, an encouraging first step and the clearest single opportunity to grow the orchestra's social reach.

Staff: 100% said the BSO brings the highest-quality music into people's lives; 68% called it an inclusive space to connect with the community.

CASE STUDY
The Wednesday-night watch party

Long-standing members – a retirement community, Bournemouth

For nearly a decade, they were Gold-level members and full-season subscribers at Lighthouse in Poole, attending BSO concerts regularly. When travelling into town on a Wednesday evening became too difficult, they moved to a digital subscription. Rather than lose the experience, they found a way to share it.

They began streaming concerts on the big screen in their retirement community's hobbies room, inviting neighbours to join them. A simple idea became a weekly gathering: 15 to 20 residents now come together to watch the BSO perform.

The music matters, but so does everything around it. Some attendees are wheelchair users; others can no longer travel into town. For many, this is their only opportunity to experience live orchestral performance. More importantly, it gives them a reason to leave their homes, spend time with others and share something meaningful together.

The interval has become part of the ritual: a drink, a conversation, a chance to catch up. Residents notice when someone is missing and check in on them. Quietly, the watch party has become an anchor of community life.

For them, digital is not a replacement for the concert hall. It is a bridge that has allowed their relationship with the orchestra to continue. The BSO has remained part of their lives – not only as music to listen to, but as a source of connection and belonging.

> "It keeps music alive for people who can't get to the hall."

Because the couple cover the subscription themselves, others are able to join without charge. In return, the group contributes what it can to the BSO. One resident, unable to attend the viewing one week, sent £40 as a thank you.



CASE STUDY
More than concertgoers

BSO patrons and donors

They were both going to BSO concerts before they met. Their third date was at Portsmouth Guildhall, and the orchestra has been part of the fabric of their relationship ever since.

When the BSO launched a Piano Appeal in 2018, it felt natural to do more than attend: they became patrons, directing their giving to the work they care about most, including the hospital and care home programme. Their support for the hospital and care home programme was especially meaningful, shaped by their own family experience of dementia and the difference music can make at vulnerable moments in people's lives.

The school work moves them for another reason. They have sat in Portsmouth Guildhall with 1,600 children, many of whom have never heard a live orchestra, and watched them discover something that might stay with them for the rest of their lives. That first encounter with orchestral music, the auditory experience of a full ensemble in a live space, is an irreplaceable moment in a child's development.

> "We want to be more than just concertgoers."

They also see the wider economic impact of the orchestra through their own behaviour. When they follow BSO to Truro, they stay for three nights. Hotels, restaurants, visits to local businesses and all the activities they do in between would not happen without the concert. A Poole concert typically means a night away. They know others who do the same; many audience members travel, stay and spend money to follow an orchestra they love and they believe it is worth travelling for.

What they describe is not simply charitable giving, but a personal investment in something that has enriched their lives and that they want to see thrive for future generations.



4.2 **HEALTH** *and wellbeing*



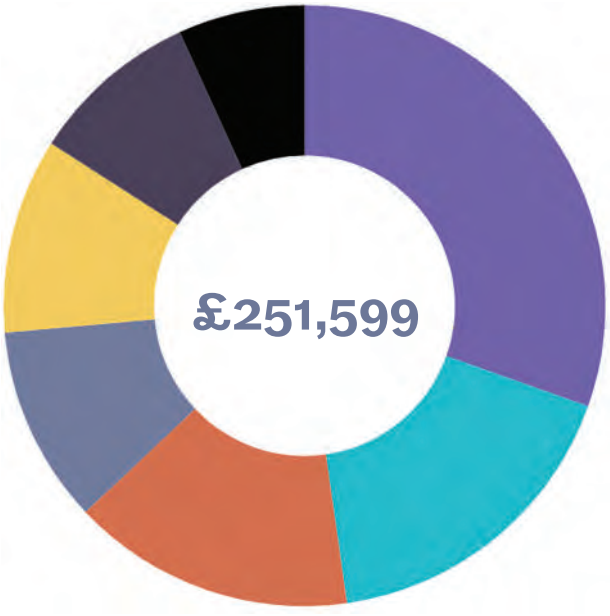
BSO is an inclusive healer beyond medicine.

It is a non-drug source of calm in a paediatric waiting room, a weekly anchor for people in recovery, and a reason to keep going. This dimension covers emotional and physical wellbeing, quality of life, resilience and mood.

Table 3. **Monetised Value (TOMs): £313,626** (1.8% of total social value)

MEASURE	% OF DIMENSION	VALUE
Support for community health or wellbeing interventions	80.2%	£251,599
Support for common mental health issues	15.3%	£48,001
Multidimensional wellbeing programme access for staff	4.5%	£14,025

Figure 10. **BSO's Social Value distribution** Support for Community Health or Wellbeing Interventions Measurement, 2025[22]



- Music in Hospitals: £76,396 (30.4%)
- Somerset Wellbeing Orchestra: £43,474 (17.3%)
- Bristol Recovery Orchestra: £38,318 (15.2%)
- Music in Mind: £26,778 (10.6%)
- Time Together: £26,454 (10.5%)
- Cake Concerts: £23,016 (9.1%)
- Maggie's Family Orchestra: £17,163 (6.8%)

Developed by: Sound Diplomacy



Most participants access these programmes through referral from health and social-care organisations: Bristol Drugs Project refers people in recovery from addiction to the Bristol Recovery Orchestra, the Balsam Centre refers mothers experiencing postnatal low mood to Time Together, and Cornwall Mind and Ark at Egwood refer participants to their respective programmes. Other programmes, such as Cake Concerts, operate on an open-access basis.

DEEP DIVE
Music in Hospitals



Music in Hospitals delivered musical activity across two NHS trusts in Dorset in 2025. Sessions took place with the Dementia Team, Stroke Ward, Paediatric Ward, and Children's Centre at Dorset County Hospital, and on wards for patients with organic mental health conditions at Alderney Hospital. The programme was delivered with older patients with complex mental health, families, and hospital staff.

The programme involved 39 full-day visits and 17 half-day visits. Each session was led by a BSO Associate and freelance musician working within the clinical environment. BSO staff invested 452 hours in preparation, coordination, and delivery across the two hospital sites. This included 112 hours from the Participate Coordinator on scheduling and logistics, 220 hours from the Senior Programme Manager on partnership liaison and attendance, and 120 hours from departmental leadership on management and safeguarding.

The partnership with both hospital trusts was ongoing. Sessions were integrated into ward schedules and clinical care pathways rather than offered as separate community activities. The programme addressed multiple patient populations with different clinical needs: people living with dementia, patients recovering from stroke, children and young people in hospital settings, and staff wellbeing.

The social value generated makes it the highest contributor to the dimension's total social value.

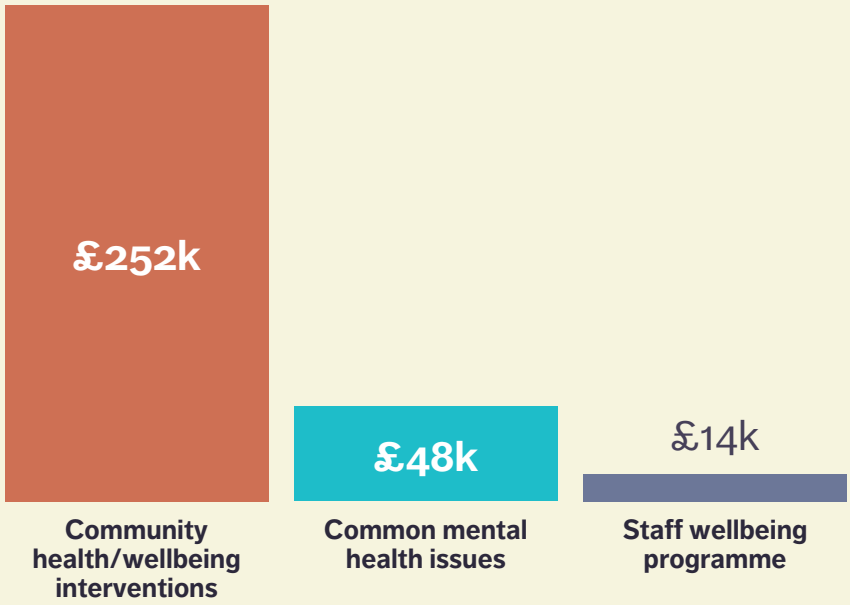
Staff hours
452

Social Impact generated
£76,396

Sessions delivered
39 full days and 17 half days

Clinical partners
Dorset County Hospital and Dorset Healthcare University Trust

Figure 11. **Health & Wellbeing social value by measure, 2025**



PERCEIVED VALUE

Mood is transformed. 93% of participants[23] said a BSO programme improves their mood (the highest-scoring outcome across programme participants), and 96% of concert audiences said attending made them feel happier.

Those who need it most, benefit most. Participants with additional needs scored equal or higher than the overall sample on quality of life (4.28 vs 4.23), strengthened connections (3.87 vs 3.79), resilience (3.95 vs 3.85), access to unique programmes (4.05 vs 3.95), and new skills (3.21 vs 3.01).

What each group told us:

Participants: 79% said BSO programmes improve their quality of life and 67% that they build resilience.

Teachers: 88% agreed a BSO programme makes their class feel happier (the top wellbeing outcome in their survey).

Attendees: 63% said a concert reduced their stress and improved their mental wellbeing.

Staff: 94% described the BSO as an advocate for the benefits of music in the community.

CASE STUDY
A non-drug source of calm

Paediatric Outpatient Lead – Dorset County Hospital NHS Trust

It began on the acute paediatric ward when a consultant, watching the musicians during a round, noticed how the atmosphere changed and asked whether it could work in outpatients. They ran a trial, it worked, and it has run ever since in a department that sees patients from birth to 18 across a wide range of clinics, including a daily blood clinic.

Every Thursday, BSO musicians spend thirty minutes in the outpatient waiting room. It is not a concert: they interact, offer instruments, sing. For children waiting for procedures that cause anxiety, live interactive music has become a non-drug source of distraction and calm at the moment anxiety is highest. A child who has just had a blood test and is still tearful will move towards the musicians, start dancing, join in and the stress lifts. Staff feel it too: receptionists, nurses and consultants step out to listen for a few minutes before returning to work.

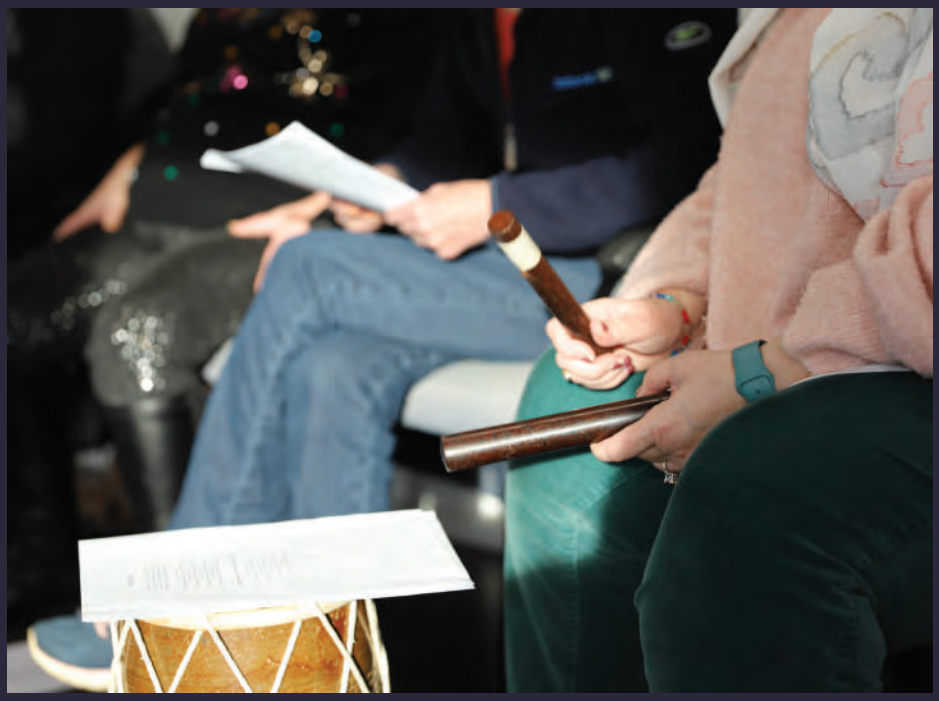
> "I can hear the orchestra from my office... just to be able to step away for five minutes – we all know that lowers tension and anxiety. Even for me, I sit and listen to it."



CASE STUDY
'You can't walk past without smiling'

Community partner – ARK at Egwood, Somerset

"If you put the social value of that as a treatment or medicine, there's no price you can put on it."



ARK at Egwood supports people who are vulnerable, with mental health conditions, complex needs and few resources to access activities elsewhere. It is their safe space. The BSO has been going every week for three years for collaborative music-making sessions (singing, playing instruments, writing songs together). The music matters, but so does the relationship. The same musicians return every week, creating trust and familiarity. For people whose lives can often feel unpredictable, that consistency becomes a source of stability.

People often arrive anxious and withdrawn and leave buzzing; conversations carry on for days; several have bought their own instruments. There is a woman in the group who is non-verbal and was uneasy with vocal work but the music leader found a way in through the bass guitar, and photographed her playing so she could show her parents. One participant now greets the founder each week by setting up a drumming rhythm, waiting for a response. Others sing to themselves in the corridor.

The strength of the partnership over three years also helped ARK demonstrate the value of creative activity, contributing to its successful Arts Council funding application and plans to create a permanent arts space.

4.3 **INDIVIDUAL** *development*



BSO is where potential ignites.

It is where a child picks up an instrument for the first time, where a disabled young musician learns there is no limit to what they can achieve, and where confidence, focus and creativity are built to last.

Table 4. **Monetised Value (TOMs): £76,376** (0.4% of total social value)

MEASURE	% OF DIMENSION	VALUE
Expert curriculum support for universities and colleges	48.3%	£36,890
Personalised support to improve career and life skills	40.7%	£31,088
Employment taster days (project related, sector or industry)	11.0%	£8,388

Expert curriculum support for universities and colleges is formed of three initiatives: the Trinity Laban Side by Side day, the University of Southampton Community Music module, and Journalism in Action. Personalised support to improve career and life skills covers five initiatives delivering tailored, expert-led mentoring: Young Associates, Young Associates Legacy, BSO Elevate, the Calleva Assistant Conductor Programme, and NOYO musicians' integration.



DEEP DIVE
NOYO musicians in SEND schools' tour



The SEND schools' tour incorporated a professional development strand in 2025, inviting three alumni from the National Open Youth Orchestra (NOYO) to join the ensemble as instrumentalists, including one musician playing an electronic accessible instrument. Over seven days of activity, the three musicians took part in two rehearsal days, three SEND school concerts, and one public BOYD concert, sitting side by side with BSO musicians and receiving coaching throughout.

This placement offered a form of professional development that cannot be replicated in a standard training setting: the musicians rehearsed and performed alongside a professional orchestra, adapting in real time to the demands of ensemble playing within an accessible, inclusive performance context.

BSO's Senior Programme Manager, Access Producer, and Head of Participate supported the initiative, collecting access riders, rearranging musical parts, and preparing visual stories in advance of the work. The personalised, expert-led hours recorded for this initiative totalled 30 hours (2 rehearsal days × 5 hours × 3 musicians).

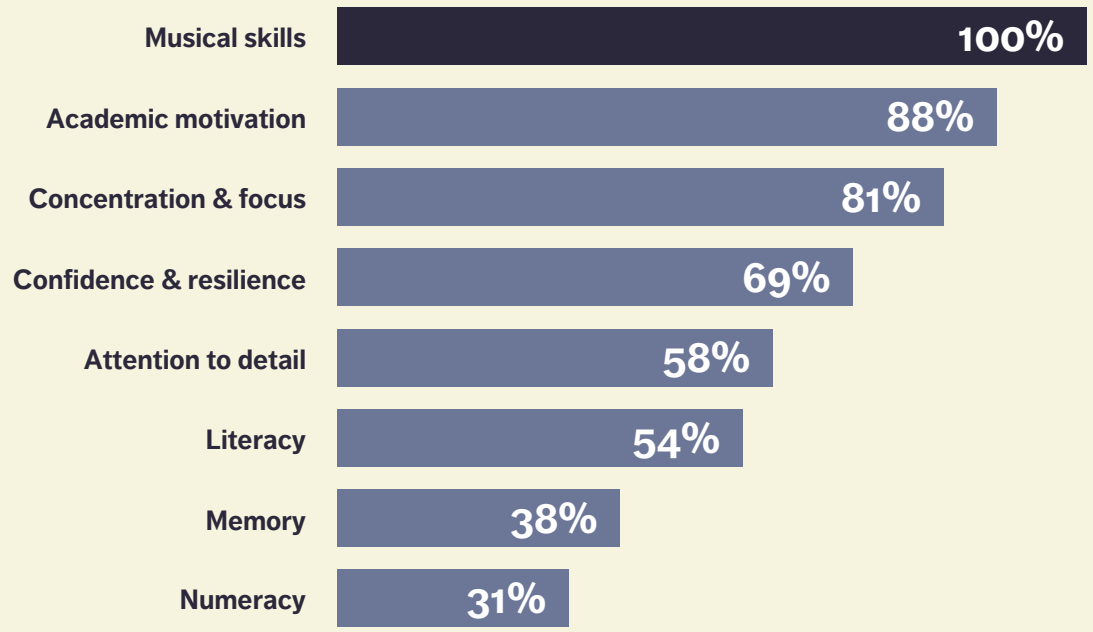
Staff hours
30

Social Impact generated
£3,329.70

Participants
3 early-career disabled musicians (NOYO alumni)

Date
July 2025

Figure 12. **Teachers reporting improvement in their classes following BSO programmes (n=26)**



PERCEIVED VALUE

Teachers see it in the classroom. Every teacher surveyed (100%) reported an improvement in their pupils' musical skills, and every teacher observed at least one cognitive gain, most often academic motivation (88%), concentration and focus (81%), and attention to detail (58%).

Learning travels beyond music. More than half of teachers (54%) saw improvements in literacy and 31% in numeracy, while around seven in ten (69%) observed greater confidence and resilience. This is evidence that the discipline of an instrument transfers to the rest of school life.

Skills are strongest where they are the focus. Among participants, gains in new skills conducive to improving employment and career opportunities scored most modestly overall (29%), but rose sharply in programmes designed around skill-building. Somerset Wellbeing Orchestra (77.8%) and Bristol Recovery Orchestra (62.5%) returned the highest scores of all, showing the model works precisely where it is aimed, with clear room to extend that intent across more programmes.

What each group told us:

Participants: gains in new skills were most pronounced in the Wellbeing and Recovery Orchestras, pointing to where the BSO's skill-building is most deliberate.

Attendees: 96% said a BSO concert made them feel happier and 65% said it made them feel better about themselves.

Staff and musicians: 100% described BSO as bringing the highest quality music into people's lives and 99.4% as an ambassador for music in the South West.

CASE STUDY
No limit to what they can achieve

A young horn player – National Open Youth Orchestra (NOYO)

Still at school when he first encountered the BSO, he joined NOYO when it came to the area. For the first time, he found a musical environment where disability was not a barrier, and where he could imagine what might be possible. Over the years, his involvement has deepened into something that would shape the direction of his life.

In 2018 he gave a speech to the local council on behalf of the BSO's work with disabled young musicians. The nerves were real, but the confidence he gained stayed with him: the following year he led the marketing and logistics for the NOYO Showcase, earning his Silver Arts Award and building skills in event management, communication and creative leadership.

NOYO gave him more than technique: a safe space where music provides another way to express yourself, connect with others and build confidence, where friendships form through playing together, and where disability has never been a reason to hold back. One of his most treasured memories is performing alongside his father, both on horn, while his mother watched from the audience.

This young musician who joined NOYO as a participant is now helping shape the future of inclusive music-making as a co-researcher with Open Up Music.

"I want other disabled young people to know there is no limit to what they can achieve through music."



CASE STUDY
From four violins to a full orchestra

A Primary School Music Lead – partner school, Poole

Ten years ago, the school orchestra began with four violins and a handful of recorders. Today, 65 to 80 children take part every week, with strings, brass, woodwind, percussion and instruments she never expected to see in a primary school.

The journey began through the BSO's Takeoff programme. An Associate BSO musician co-led the first session and stayed in touch, offering the practical guidance and encouragement that helped her build the orchestra with confidence, and asking the questions she hadn't thought to ask: "what does the session plan look like?", "how do you structure a workshop?", "what warm-ups should we use?". The BSO did not simply provide musicians for a project; it transferred knowledge, confidence and practical expertise that enabled the school to build something lasting.

Friday is orchestra day. Children who have struggled elsewhere find a place to shine. When professional musicians from the BSO visit, sitting alongside them in rehearsal and interacting with them face to face, the children do not see them as distant figures: they see them as people they can learn from and alongside whom they belong. One former pupil is now training in the Army as a musician, and around 12 alumni return each week to help run the orchestra in a cycle of receiving, growing and giving back. The impact is broader than those who choose music as a career: children grow up seeing creativity, collaboration and ambition as part of their everyday lives. This is in itself one of the most tangible signs of a community being built around music.



"They just think it's completely normal to sit next to a professional musician. They see music as a career choice like any other. And I love that."

4.4 **ECONOMIC INCLUSION** *and fair opportunity*



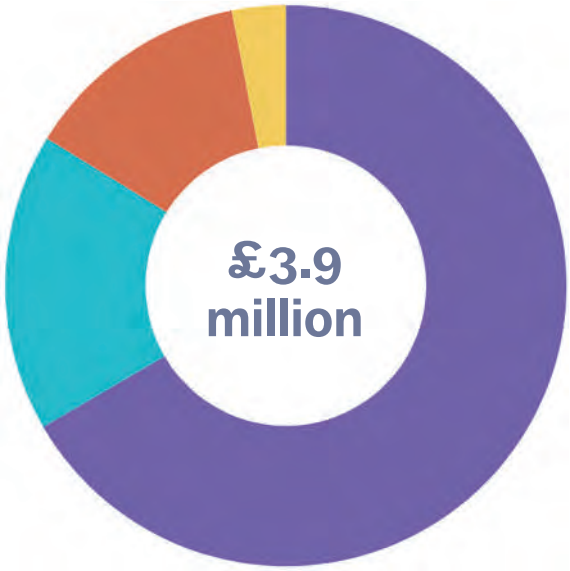
BSO is a great place to work.

As the largest arts employer in the South West, the orchestra creates social value not only through what it performs, but through how it employs, hires and develops people. This dimension captures the BSO's conduct as an employer, procurer and champion of fair work, fair pay, inclusive hiring, local procurement and embedded EDI practice, sustained across the organisation.

Table 5. **Monetised Value (TOMs): £3.9 million** (21.9% of total social value)

MEASURE	% OF DIMENSION	VALUE
Local people employed or retained	66.6%	£2.6 million
Spend with local SMEs in the supply chain	17.2%	£672,036
Local people with disabilities employed or retained	13.1%	£508,886
Other 15 initiatives (incl. EDI training, VCSE spend, Union recognition)	3.1%	£119,030

Figure 13. **BSO's Social Value distribution** Economic Inclusion and Fair Opportunity

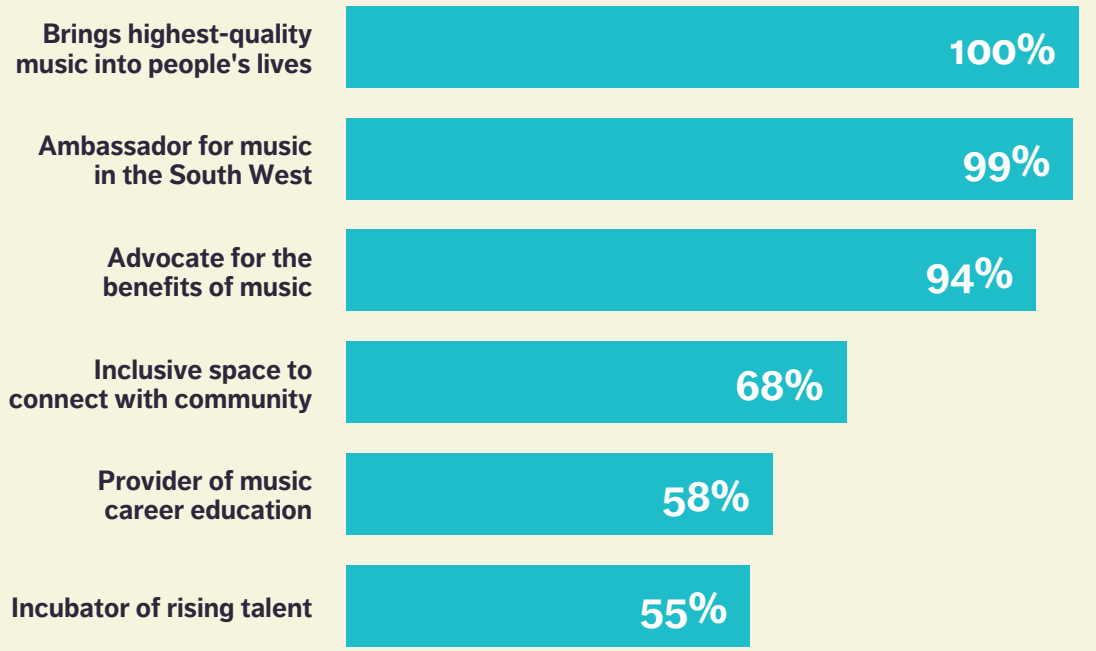


- Local people employed or retained: £2.6 million (66.6%)
- Spend with local SMEs in the supply chain: £672,036 (17.2%)
- Local people with disabilities employed or retained: £508,886 (13.1%)
- Additional 15 initiatives: £119,030 (3.1%)

Developed by: Sound Diplomacy



Figure 14. **How BSO staff describe the orchestra's role in the community (n=159)**



PERCEIVED VALUE

A workforce that is proud and supported. 97% of staff musicians agree that the Orchestra Committee is active and supports a productive and successful working environment; 100% of administrative staff understand and can access their benefits; 85% feel able to ask for support when needed, and 95% of freelance musicians are proud to work with the BSO and 90% feel well supported.

Real pathways into the profession. The Young Associates programme, a seven-month paid placement for eight young people from under-represented backgrounds, saw every one of them go on to build a freelance arts career, and they are all still connected to the BSO.





What each group told us:

Orchestra musicians: 97% rate the Orchestra Committee active and effective. Work-life balance and flexibility scored lowest – an honest signal, and a defined priority for the orchestra to address.

Administrative staff: strong on benefits and support (100% understand their benefits); awareness of the Elevate talent framework (38%) is a straightforward internal-communications win.

Freelance musicians: positive across every item – pride (95%), communication (93%), conditions (92%). Health-and-safety communication (64%) is the clearest place to strengthen an already strong picture.

Figure 15. **Freelance musicians' workplace experience (n=106)**



CASE STUDY
'It feeds into the work'

Senior Programme Manager – BSO Participate

Since joining in 2018, it wasn't just the work that has continued her desire to be involved with the BSO, but the way her development has been supported throughout.

Support that has led her to build a portfolio spanning schools concerts, NOYO and community health programmes, complete her Gold Arts Award, and be selected for the Britten Pears Arts Future Leaders retreat. Stepping up when her manager left in 2020, pivoting the entire schools programme to digital during the pandemic, and being given the time and resources to grow. She has built, as she puts it, a cohort of "critical friends" across the sector, people of similar age facing similar challenges in similar roles.

The programmes she creates and works on are each designed differently, because they serve different needs: work with schools aims to spark a moment of inspiration that might lead a child to pick up an instrument; NOYO prioritises social impact and pathways for disabled young musicians; Creative Health work centres on wellbeing and recovery. She does not try to make them all do the same thing, focusing on serving the communities with care and understanding.

> "It's very rewarding. You get to know all of the people really well, and that's why all of us do it."

Asked for the story that best captures what the BSO can do, she mentions the Young Associates programme: eight young people from under-represented backgrounds, every one of whom went on to a freelance arts career and stayed connected to the orchestra. It is, she says, a springboard, a sustained investment in the next generation of arts leaders, not a one-off.



CASE STUDY
The difference between a gesture and a posture

BSO Musician and Musician Trustee



> "We literally have the assets to get in the race and meet young people in the early stages – and offer them excellence. Someone has to do something, and we're the biggest organisation here."

A member of the orchestra for nearly 25 years, and a Musician Trustee. In that time he has watched the orchestra grow, adapt, and deepen its connection to the communities it serves and has been an active participant in shaping what that means.

He holds a rare dual perspective: someone who has spent a career on stage and is equally invested in the strategic decisions made off it. The idea he returns to most is the difference between a gesture (an occasional act of goodwill) and a posture (an organisation with community embedded at the heart of how it understands itself). He believes the BSO is well on its way, and wants to help it to go further.

Part of what excites him about the BSO's position is the sheer scale of what it has to offer. As the largest performing arts organisation in the South West, with some of the finest musicians in the country within its ranks, the orchestra has assets that very few organisations in the region can match. He is particularly energised by the potential to serve young musicians at the earliest stages of their development. For him, community access and artistic excellence are inseparable: it is the quality of what these musicians do that makes a young person's encounter with them meaningful.



5. CONCLUSION

This study set out to measure the economic and social impact of the Bournemouth Symphony Orchestra, and found an organisation whose value runs far wider than any single number can hold.

From a local operating budget of £3.4 million, **the BSO generated £11.4 million of economic impact, turning every £1 spent in local economies into £2.29 more, additionally it generated £17.8 million of social value in 2025.**

Four independent methods, asking four different questions, arrived at the same conclusion from different directions: this is an orchestra that delivers value many times greater than the resources invested in it, and does so across a region of more than 10,000 square miles, in concert halls and classrooms, hospitals and care homes, cities and villages alike.

What makes the BSO distinctive is not only the scale of its impact but its shape. The orchestra creates most of its social value through the shared experience of live music, because coming together is one of the most powerful things people do, and it concentrates its most intensive work where it is needed most. **Those who face the greatest barriers, including participants with additional needs, consistently report equal or the greatest benefit, and the programmes built deliberately around skill-building and wellbeing return the highest scores of all.** This is impact by design. Where the findings point to room to grow, whether in extending targeted skills work, converting first-time attendees into wider cultural participation, or strengthening flexibility for orchestra musicians, they describe not shortfalls but the orchestra's clearest opportunities to build on already firm foundations.

The evidence is clear: the BSO is not simply a cultural organisation, it is a regional economic asset and generator of lasting social value. A legacy it continues to add to. As the Orchestra enters a critical phase of business planning, these findings give funders, partners, policymakers and communities a robust, evidence-based account of what their investment delivers, and a firm platform from which the BSO can expand its reach, deepen its impact, and continue bringing the transformative power of music to as many people across the South West as possible.



ENDNOTES

1 TOMs stands for Themes, Outcomes, and Measures. It is the leading standard used across the public, private, and third sectors in the UK to record and report Social Value. The framework organises impact under four Themes: Work (employment opportunities), Economy (inclusive economic growth), Community (community empowerment), and Planet (environmental stewardship). Each Theme contains specific Outcomes, the intended change an organisation is working toward, and each Outcome is tracked through Measures, the concrete, quantifiable actions taken to achieve it. This structure allows social and environmental impact to be reported consistently and compared across organisations and sectors.

2 Di Stasio, and Manuguerra. 2024. "Playing Music Together: Exploring the Impact of a Classical Music Ensemble on Adolescents' Life Skills Self-Perception." PubMed Central.

3 Vernia-Carrasco, Ana Mercedes, et al. 2024. "Music Education for Health at All Ages: A Spanish Case Study." ResearchGate.

4 Fancourt, Daisy, Kimberley Warran, et al. 2021. "How Do Music Activities Affect Health and Well-Being? A Scoping Review of Studies Examining Psychosocial Mechanisms."

5 Idem

6 Fancourt, Daisy, Kimberley Warran, et al. 2021. "How Do Music Activities Affect Health and Well-Being? A Scoping Review of Studies Examining Psychosocial Mechanisms."

7 de Witte, Martina, et al. 2022. "Music Therapy for Stress Reduction: A Systematic Review and Meta-Analysis." Health Psychology Review 16 (1): 134–159. (Cited in We Are All Music Foundation 2025.)

8 We Are All Music Foundation. 2025. "The Impact of Music Experiences on Emotions, Mental Health, Suicide Prevention." Accessed 2025. https://weareallmusic.org.

9 Idem

10 Mount Sinai. "Music Therapy for Cancer Patients." Accessed 2025. https://www.mountsinai.org.

11 Cancer Research UK. "Music Therapy." Accessed 2025. https://www.cancerresearchuk.org.

12 Flint Rehab. "Music Therapy for Stroke Patients: 7 Benefits for Faster Recovery." Accessed 2025. https://www.flintrehab.com.

13 Petrović, M., et al. 2020. "Benefits of Classical Concerts on Students' Wellbeing – Results from the European Research Project." ResearchGate.

14 Fancourt, Daisy, Kimberley Warran, et al. 2021. "How Do Music Activities Affect Health and Well-Being? A Scoping Review of Studies Examining Psychosocial Mechanisms."

15 Concina, Eleonora, and Michele Biasutti. "The Social Impact of Music Education." Biblioteka Nauki. https://bibliotekanauki.pl/chapters/1622373.pdf.

16 Source: Sound Diplomacy analysis, drawing on the National TOMs (Themes, Outcomes and Measures) social value framework.

17 This figure corresponds to BSO's direct spending in BCP, Portsmouth, Exeter, Bristol and other venues.

18 International visitors averaged £199, a small sample of eight, to be read with caution, but pointing at a pattern.

19 Concerts and programming include BSO's public concert season as well as the SEND Schools Concert tour, Symphony from Scratch, KS1 concerts, etc.

20 The official TOMs denomination for this measure is "Support for local community projects through donations".

21 In the Arts Council England (ACE) terms, which are the parameters BSO adheres to, Hampshire is considered part of the South West region. Therefore, opera performances at The Grange Festival (in Hampshire), concerts in Southampton, and Basingstoke concerts are included within this regional scope.

22 Percentages may not add up exactly to 100% due to rounding.

23 Programmes include BSO Voices, Symphony From Scratch, Cake Concerts, Somerset Wellbeing Orchestra, Bristol Recovery Orchestra, Time Together, Exeter Community Family Orchestra, Maggie's Family Orchestra, Music in Hospitals, and Music in Mind, Bodmin.

Photos and Images Courtesy Of:

Front Cover – Clockwise from top left: BSO performance shots ©Mark Allan; Portsmouth Guildhall Square ©Steve Spurgin; BSO Participate activity ©BSO

Pages – 1,2, 16, 18, 29, 32, 46, 49, 51 ©Mark Allan

Pages – 3, 14, 48, 53 ©Patrick Baldwin

Page 4 ©Mercedes-Benz

Pages – 9, 11, 25, 33,40, 50, 52 ©Corin Messer

Pages – 10, 20, 22, 24, 27, 31, 34, 36, 38, 42, 44,45, 47 ©BSO

Page 13 Montage – clockwise from top left: ©Mark Allan; ©Corin Messer ©Steve Spurgin; ©JPMorganChase

Pages 17, 41 @Open Up Music

Page 35 ©Bristol Drugs Project

Page 39 ©Octagon Theatre





© Sound Diplomacy
www.sounddiplomacy.com