

American Guild of Organists 2014 Survey

Past, Present and Future Members

Digest

January 2015

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In October 2014 the Marketing Committee conducted a survey of Past, Present and Future Members of the American Guild of Organists. 5,692 persons responded to the survey, including 4,788 current members. This extremely large sample, representing almost a third of the total membership, makes it possible to generalize confidently from the survey sample to the entire AGO membership. The survey report runs to almost 100 pages. It is available at <https://www.agohq.org/ago-past-present-and-future-member-profile/>

To facilitate discussions at the January 2015 National Council meetings, the Marketing Committee compiled the following Survey Digest. The digest represents only about 20% of the total report. In assembling the digest we have prioritized questions that we think are *actionable* and have immediate implications for Guild leaders. To help readers understand how the items in the Report Digest fit into the complete survey report, we have put items contained in the digest in **bold** within the following list of complete survey topics.

Introduction: Rationale; Methodology; Reliability of Data

Demographics: **Q1 - Current AGO Age Distribution; Future Membership Projections;** Q2 - Gender; Q3 - Ethnicity; Q4 - Proximity to Educational Resources; Q5 - Proximity to Organ Recitals; Q6 - Language; Q7 - Health

AGO Engagement: **Q8 - Membership Status; Q9 - Reasons for Lapsed Membership;** Q10 - Chapter; Q11 - Region; **Q12 - Convention Attendance; Q13 - Chapter Meeting Attendance;** Q14 - Service as an Officer; **Q15 - Certification;** Q16 - Reasons for Not Pursuing Certification; Q17 - Highest Certification; Q18-19 Partially Completed Certifications; **Q20 - Value of AGO Membership**

Communications: **Q21 - News Media Usage;** Q22-23 Electronic Device Ownership & Use; Q24 - Online Activity; **Q25 - Social Media Usage**

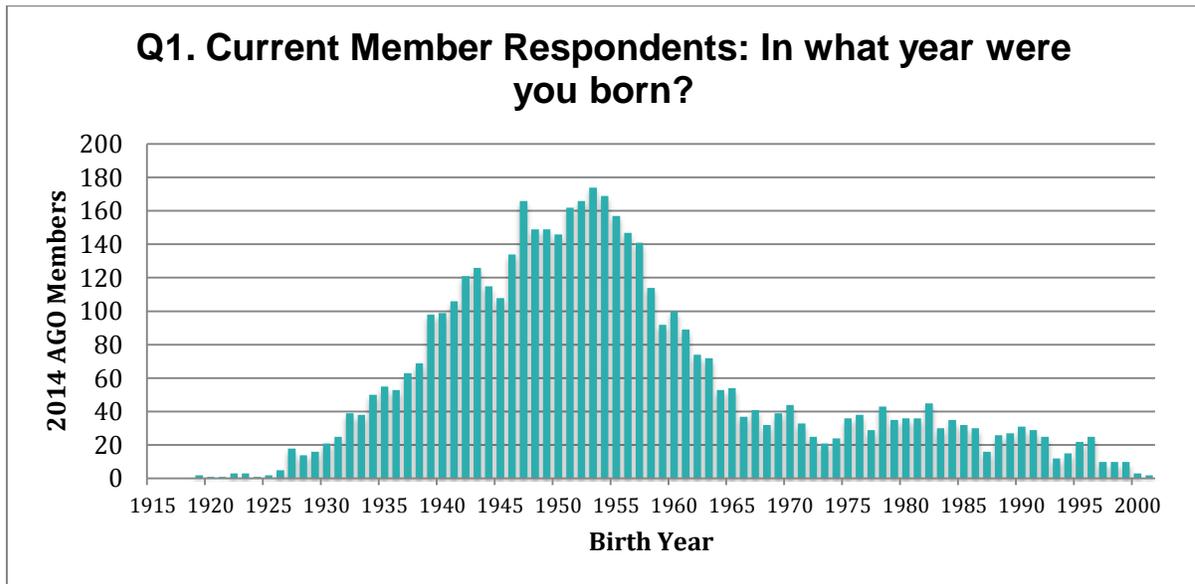
Training as an Organist: **Q26 - Level of Training;** Q27 - Interest in Skill-Building; Q28 - Weekly Hours of Organ Practice;

Employment: **Q29 - How Guild Members Earn Their Income;** Q30 - Principal Income-Generating Activity; Q31 - Income from All Music-Related Activity; **Q32 - Professional Activity;** Q33 - Reasons Not Active as an Organist; Q34- Years in Retirement; Q35 - Plans for Retirement Living; Q36 - Retired Members Organ Activities; **Q37 - Type of Instrument Played;** Q38 - Condition of Instrument; **Q39 - Weekly Hours of Employment as an Organist;** Q40 - Number of Institutions Served

Service Playing: **Q 41 - Years Served as an Organist at a Religious Institution; Q 42 - Members Currently Playing at a Religious Institution;** Q43 - Number of Services Played Per Week; **Q 44 - Denominations Served;** Q45 - Years at Current Religious Institution; Q 46 - Satisfaction in Their Service Playing; Q47 - Challenges in Service Playing; Q48 - Comfort in Various Genres; Q49 - Seeking Other Employment?; Q50 - What Keeps You Going?

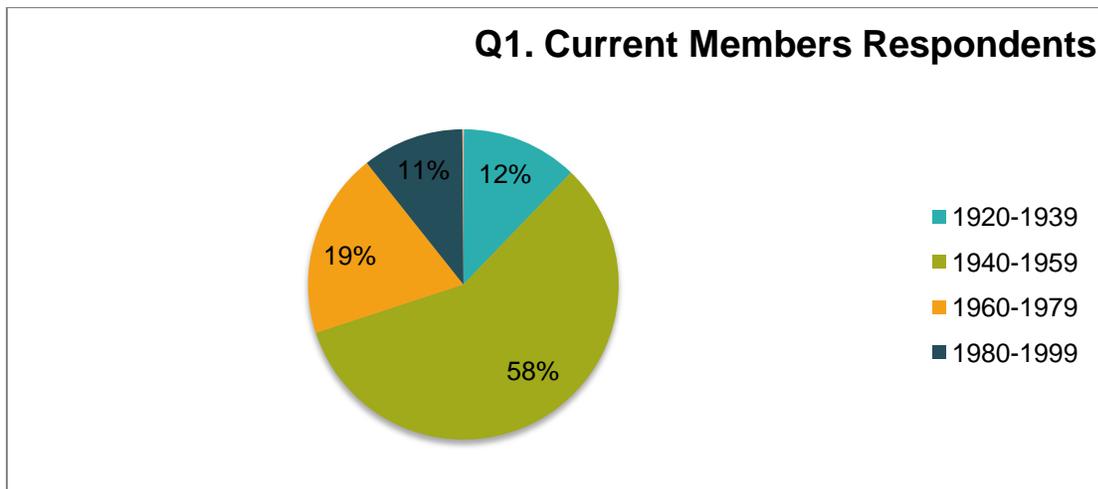
Ensembles: **Q51 - Members Directing Musical Ensemble;** Q52 - Type of Ensemble Directed; Q53 - Number of Singers in Adult Choir; Q54 - Paid Singers in Choir; Q55 - Effectiveness in Adult Choir Rehearsal; Q56 - Problems Working with Adult Choir; Q57 - Training as a Choral Conductor

Q1 - CURRENT AGO AGE DISTRIBUTION & IMPLICATIONS



Q1-A Member Survey Respondents by Year of Birth

Q1-A presents data on the number of member respondents, by year of birth. The large number of respondents who were born between 1940 and 1960 is striking. (Q1-B)



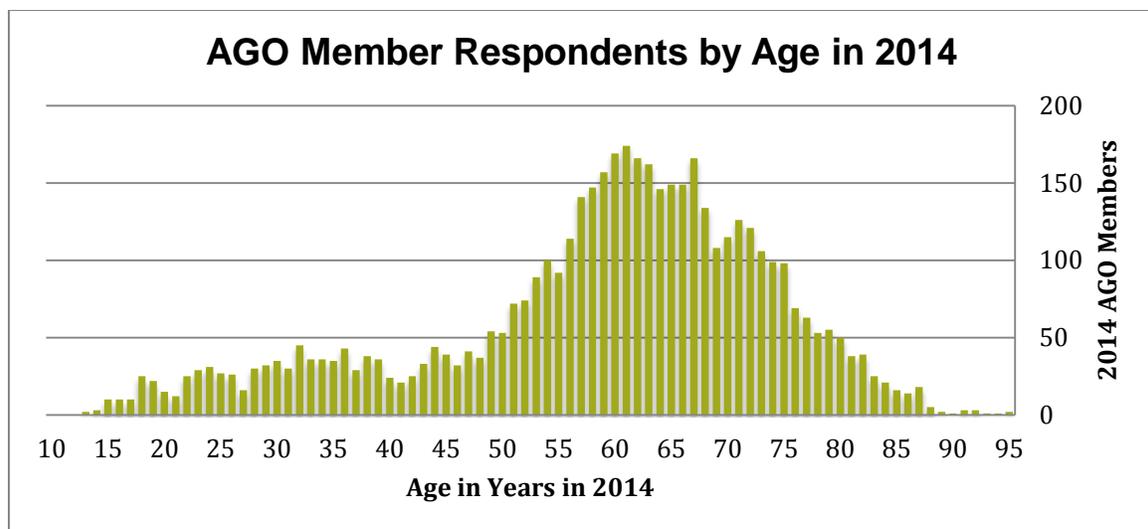
Q1-B Member Survey Respondents by 20-Year Birth Groups

Members born between 1940 and 1959 (currently 54-74 years old) comprise 58% of the total membership. It is not surprising that numbers in the earliest birth groups, that is, the oldest members of the AGO, are relatively few. Many will have “aged out” of active membership, either through retirement, for a range of other reasons, or through mortality. What is particularly remarkable, however, are the small numbers of members in the recent birth cohort years. In fact, a steep decline in number of respondents starts in members born about 1955 and continues through those born in about 1970, at which point the numbers level out at a comparatively low level. Looking at Chart Q1-B we see that three

times as many members were born 1940-1959 as were born 1960-1989. Considering these trends, it becomes clear that AGO overall membership losses are not of recent origin. The precipitous decline in membership among organists born in the 1960s points to a trend many years in the making.

Members of the Post World War II Baby Boom cohort are strongly over-represented in AGO membership. The effects of the population bubble known as the Post War Baby Boom have been called the Pig in the Python of American society. Almost every sphere of American life is affected by the rise and decline of this outsized cohort. Their retirement and exodus from the American Guild of Organists will challenge the AGO to redefine itself as a much smaller organization.

In the next two decades, current Boomer members will “age out” of the AGO, with strikingly few younger members able to “take their place.” It is clear from [Chart Q1-C](#) that the numbers in these younger, more recent birth cohorts are extremely small.



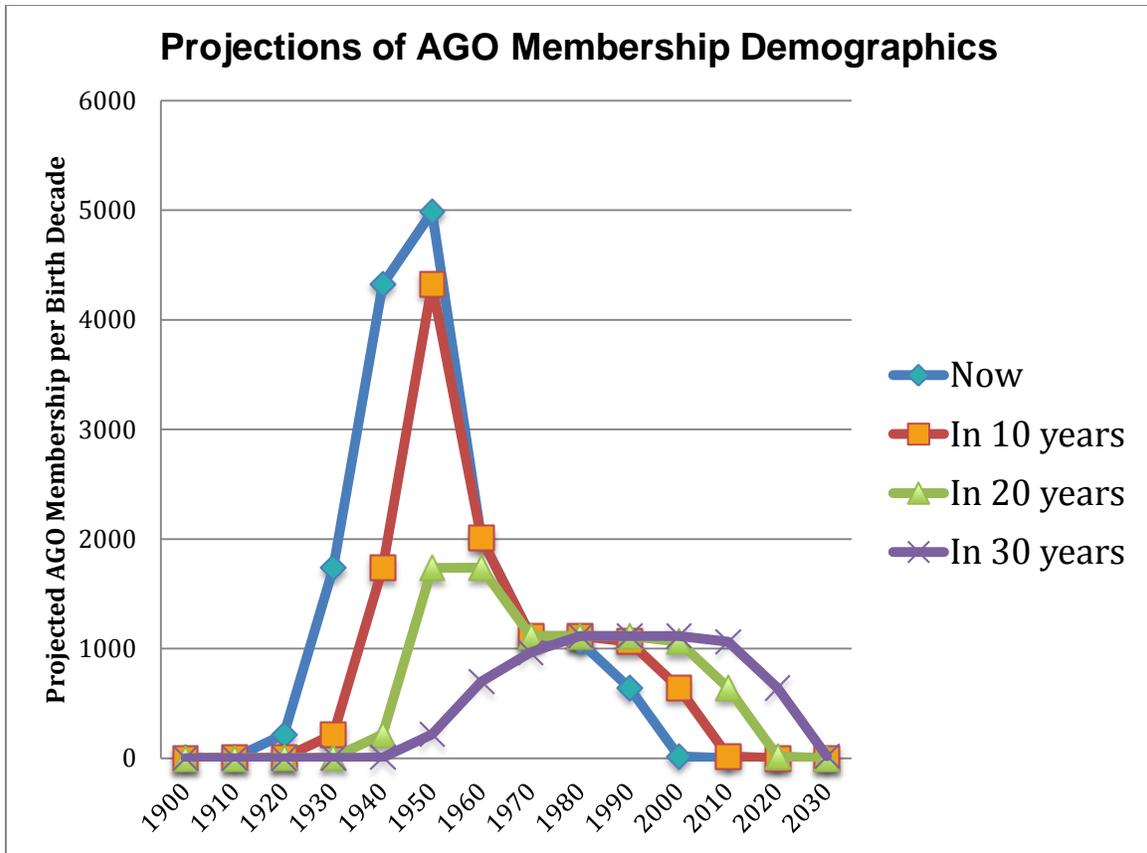
Q1-C Member Survey Respondents by Age

These massive demographic shifts lie outside the sphere of influence of the leadership of the American Guild of Organists and there is probably little that leadership can do to avoid the losses of members anticipated in the next two decades. Rather, current leadership faces the choice of envisioning and planning for a smaller organization or simply kicking the can down the road.

On a positive note, this demographic pattern will affect virtually all American institutions. Denominational music organizations, for example, will also feel the effects of this shift. The RCO and the RCCO will experience a similar demographic shift. So the case for collaboration and partnerships has never been stronger.

Finally, the demographic data suggests that today is a very good time to be a young organist embarking on a career. As the Baby Boomers retire over the next two decades, they will vacate many choice positions for which there will be a limited pool of qualified applicants.

The implications of this demographic picture for current and future AGO structure are dramatic.



Q1-D AGO Membership Age Demographic Projections 2014-2044

Several demographic projections contained in the preliminary data (Q1 D) help us visualize the AGO’s likely demographic picture in 20 years, when its many middle-aged and older members have moved out of the organization. In viewing these charts, membership should be understood as the total area encompassed under each differently colored line. So today’s membership is modeled in the area under the gray line; membership in 10 years is modeled in the area under the orange line, etc.

Of course these projections are based on assumptions about likely numbers who will join and drop out of the organization. The projections assume:

- A. The number of members joining in the past decade will remain constant in future decades. We assume that the number of new members joining in the future is unlikely to exceed current rates.
- B. Older birth cohorts will be reduced by similar factors as previous birth cohorts, exiting the organization at the same rate as previous cohorts.

Based on these assumptions, we project that in ten years the AGO membership is likely to be about 76% as large as it is now (loss of 24%); in twenty years it is projected to be about 54% as large as it is now (loss of 45%), and in 30 years, about 43% as large as it is now (loss of 57%). In absolute numbers, assuming current membership of approximately 16,000, we are projecting :

- 12,000 members in 2025
- 8,700 members in 2035
- 6,900 members in 2045

These numbers also have implications for the regional structure of the organization. As numbers drop, it is likely that the smaller chapters will disappear, necessitating further travel to attend nighttime chapter meetings. This is a particular disincentive to older members, who will constitute the overwhelming majority of members in the next decade. It seems very likely that in future years the AGO will become an increasingly urban organization.

If it is difficult for older members to attend meetings, and they don't attend conventions, then the remaining benefit to membership is primarily *The American Organist*. Persons living on a fixed income may find \$72 a year is more than they are willing to pay for the magazine. This discussion highlights the importance of developing new electronic approaches to communication, meetings, and Guild participation in general which can mitigate the challenges of older members, better match the preferences of younger members (see discussion of time spent on the internet and use of smart phones) and provide cost efficiencies for the organization.

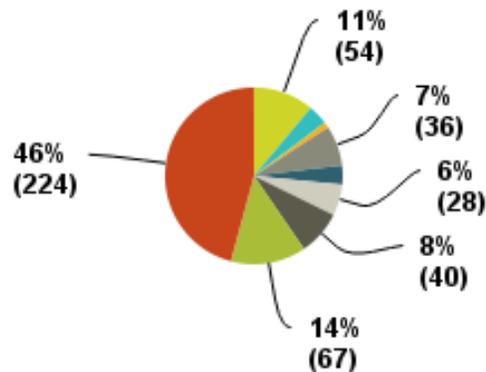
Q9 - REASONS FOR LAPSED MEMBERSHIP

The 489 former members responded to a question asking the principal reason for allowing their membership to lapse. By far their leading response was “the cost of membership outweighed its benefits” with 46% of former members choosing that answer. 14% responded that they had retired. 11% said “the organ became less important in my life.” Although inhospitable Guild meetings have frequently been identified as a significant problem for retaining members, only 6% of members said that “I never felt welcome at Guild meetings” was their primary reason for leaving the organization. A larger percentage, 7%, said “Guild meetings were unsatisfying.”

The overwhelming response that “the cost of membership outweighed its benefits” suggests that this topic would be ripe for further exploration.

Q9 What is the main reason that you let your membership lapse?

Answered: 489 Skipped: 5,203



- The organ became less important in my life.
- Personality conflicts with Guild members.
- Conventions were too expensive.
- Chapter meetings were unsatisfying.
- I never read The American Organist.
- I never felt welcome at Guild events.
- It was irrelevant to my job as an organist.
- I retired.
- The cost of membership outweighed its benefits.

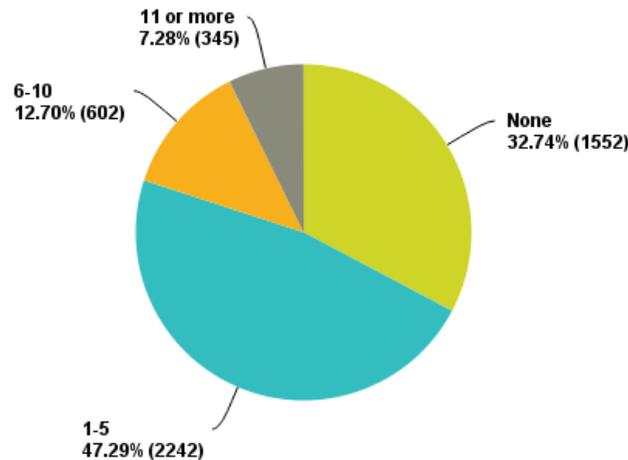
Q9 Former Members Reasons for Lapsing

Q12 - CONVENTION ATTENDANCE

33% of all respondents have never attended an AGO Convention. 47% have attended 1-5 conventions. 13% report attending 6-10 conventions. 7% report attending 11 or more conventions.

Q12 Approximately how many AGO conventions--regional and national--have you attended in your lifetime?

Answered: 4,741 Skipped: 47



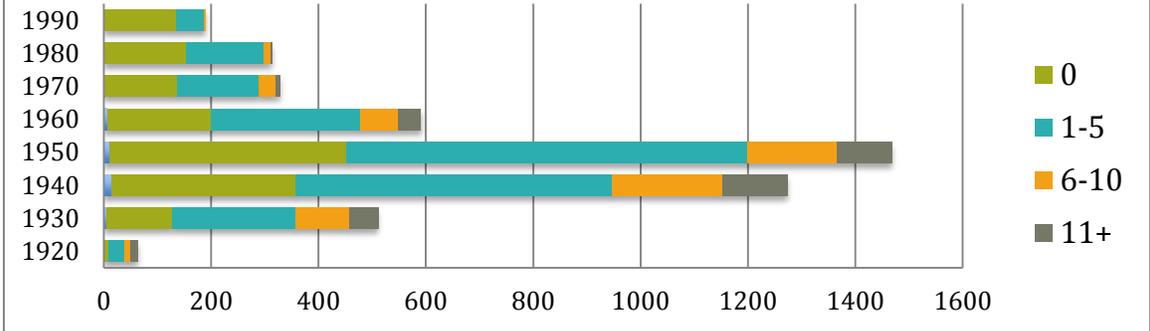
Q12-A Member Survey Respondents Lifetime Convention Attendance

- 49% of members born in the 1980s (aged 26-35) have never attended a convention.
- 41% of members born in the 1970s (aged 35-45) have never attended a convention.

If the Regional and National Conventions of the AGO are to become a meaningful part of the Guild's value proposition to its members, AGO leadership will need to fast-track multiple strategies for dissemination of the convention resources to a higher percentage of Guild members. The current allocation of energy and resources principally serves a minority of members. In short, the current convention strategy delivers little value to 1/3 of the members of the organization.

The high percentage of members born in the 1970s and 1980s who have never attended a single convention is alarming, as patterns established in their early careers as organists are unlikely to change. Q12-C shows that Baby Boomers dominate conventions from a numerical standpoint. AGO leaders will have to figure out what conventions will look like when this huge cohort becomes less active.

**Q12. Current Member Respondents:
Approximately how many AGO
conventions--regional and national--
have you attended in your lifetime?**



Q12-C Member Convention Attendance by Birth Decade - Absolute Numbers

Chapter meeting participation is a strong predictor of convention participation. 46% of members who have never attended a convention also did not attend any chapter meetings last year. 78% of members who have never attended a convention attended two or fewer chapter meetings last year. Persons attending 1-5 chapter meetings in the last year are most likely to have attended conventions.

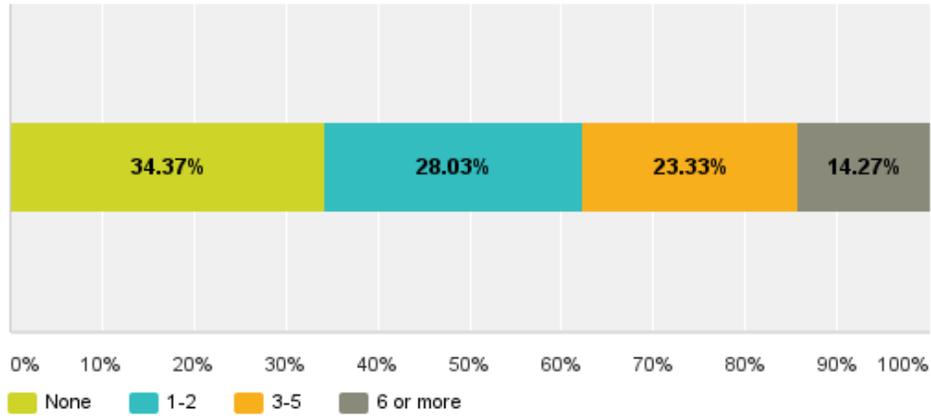
By cross-tabbing convention attendance with level of training as an organist we learn that level of training as an organist is also a strong predictor of convention attendance.

Q13 - CHAPTER MEETING ATTENDANCE

34% of members report having attended no chapter meetings last year. (This statistic includes Independent members.) 28% of members report having attended 1-2 meetings last year. 23% attended 3-5 meetings last year. 14% attended 6 or more meetings last year. These percentages remain fairly stable across members of all ages.

Q13 Approximately how many Guild chapter meetings did you attend last year?

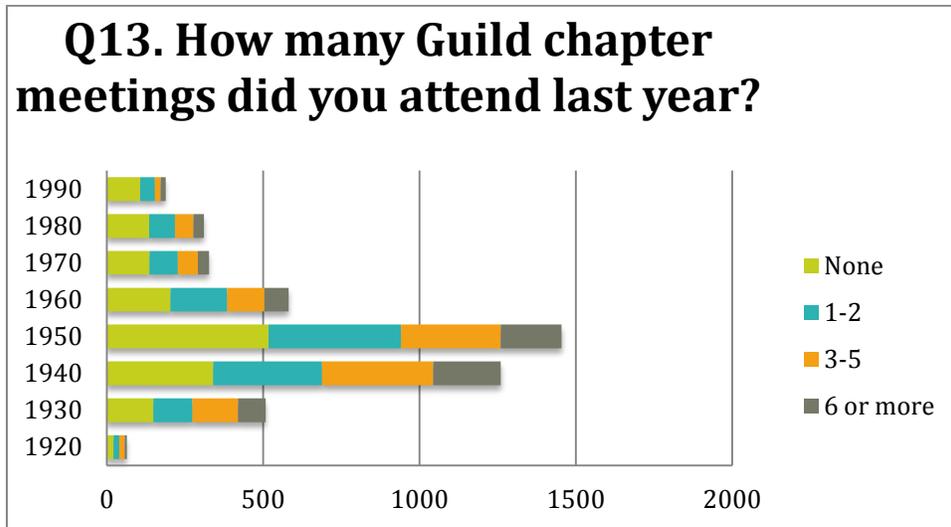
Answered: 4,737 Skipped: 51



Q13-A Member Survey Respondents Chapter Meeting Attendance

Chart 13-C depicts the age distribution of members at chapter meetings in terms of absolute numbers. It is interesting to note that 73% of members who attended a Guild meeting last year were born before 1960 (56 and older.) A college-aged new member of the AGO walking into a Guild meeting for the first time will be surrounded by people the age of his or her parents or grandparents.

It may be difficult to reconcile the needs and interests of the Guild’s youngest members with the needs and interests of the huge AARP-eligible segment. Chapter leaders may wish to consider developing non-traditional alternative chapter meetings to appeal to younger members.



Q13-C Chapter Meeting Attendance by Birth Decade in Absolute Numbers

Q15 - CERTIFICATION EXAMINATIONS

19% of respondents indicated that they have taken at least one certification examination in the course of their lifetime. 81% of respondents indicated that they have never taken a certification examination.

With a lifetime participation rate of 19%, the AGO’s certification program is currently reaching far fewer members than would be necessary if it were to be a significant part of the Guild’s value proposition to prospective members. As currently structured, the certification program offers no value to 80% of the organization’s members. This statistic, combined with the high level of members whose training consists primarily of a series of private lessons, points to the urgent need of a thorough re-examination of the certification process. In particular, Guild leaders may need to strive harder to serve the needs of the nearly half of AGO members who come to the certification table without undergraduate courses in music theory, etc., potentially developing certification programs that are accessible to every member of the organization.

While the percentage of members taking Guild examinations in each birth-decade group remains fairly constant, it is important to note that due to the over-representation of Baby Boomers in overall Guild membership, these members born roughly between 1946 and 1964 dominate certified members from a numerical standpoint. (Q17-C)

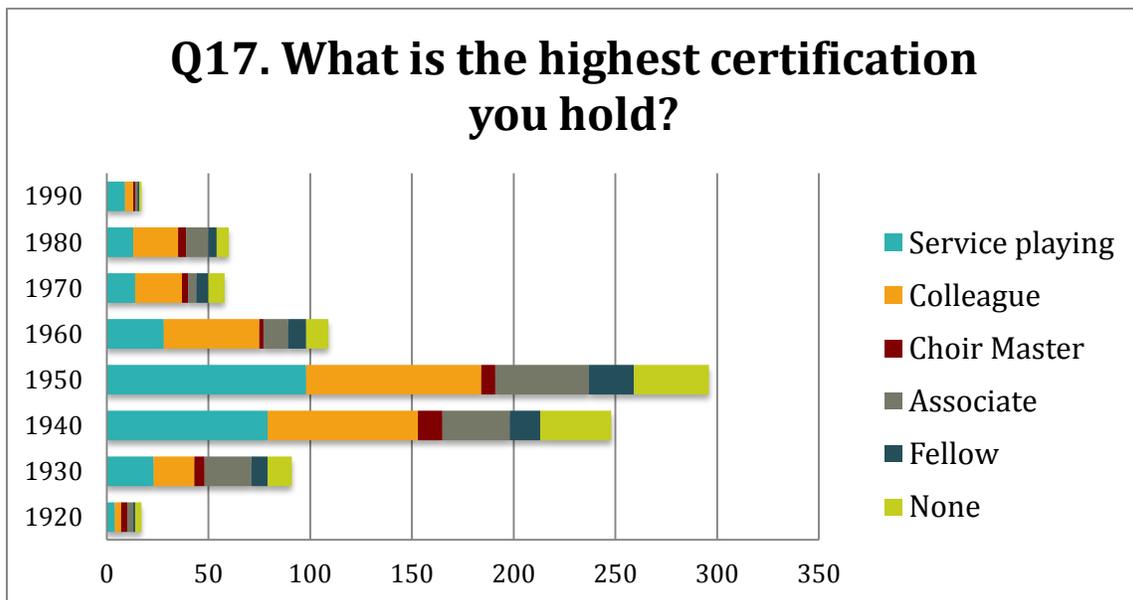


Table 1 Q17-C Certifications Held by Birth Decade in Absolute Numbers—Who is Certified?

Q 20 - VALUE OF AGO MEMBERSHIP

Across all age groups, the most valuable aspect of AGO membership was “to meet and network with professional colleagues.” 39% of members selected that response. 22% selected “to stay informed about news in the organ world” as the most valuable aspect, reflecting the importance of *The American Organist* in the Guild’s value proposition to its members.

Since members were allowed to choose only one reason, it does not mean that the other reasons are unimportant, only that they are not the most important. Conferences were the most important value to 3% of members. Educational programming was most important to 8%. Learning about job openings was most important to 6%. Nurturing the next generation of organists was most important to 4% of members. Supporting the work of organists was most important to 12% of members.

Since about 1/3 of members did not attend a chapter meeting last year, and are unlikely to have attended a convention, *The American Organist* is likely the principal plank in the Guild’s value proposition for those members. We believe they are the members most likely to allow their membership to lapse, asserting that the “cost outweighs the benefits.”

Based on these findings, we believe that every leader in the AGO must be engaged in developing new value drivers for membership. As you will see in the next section, young members will expect to have those products delivered electronically to their door.

Q21 - MEMBER USE OF NEWS MEDIA

40% of respondents indicate that they receive most of their news from TV and radio. (Q21-A) 39% of respondents indicate that they receive most of their news from the internet. A significantly smaller percentage, 21%, receive most of their news from print media. Not surprisingly, younger members (born in the 1980s and 1990s) receive about 80% of their news from the internet. These patterns of media usage among young members pose a challenge to the AGO which continues to rely heavily on print media to communicate with its members.

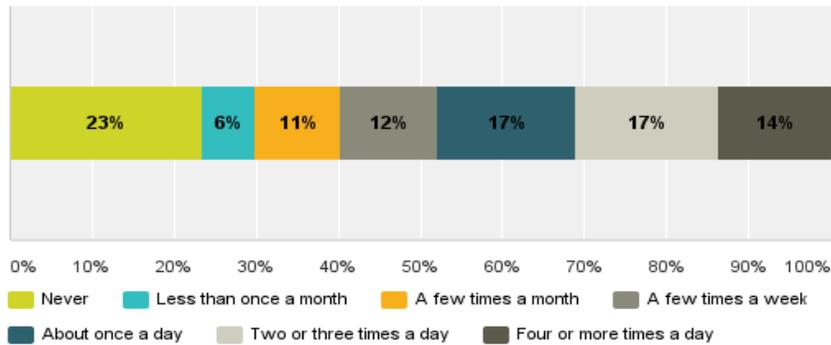
Q25 - FREQUENCY OF USE OF SOCIAL MEDIA

Looking at AGO respondents as a whole, 23% report never using social media. On the other hand, 48% of respondents indicate logging onto social media once a day or more. 29% log on occasionally, but less than daily.

When we look at these usage patterns by birth decade, we again see very divergent patterns of use emerging. More than 60% of members born in the 1980s log into social media at least two or three times a day. Almost 40% of that age group log in four or more times a day. The importance of social media to young members may be difficult for middle-aged Guild leadership to fully grasp because their own use of social media varies so much from that of younger members.

Q25 How often do you log into social media networks (e.g. Facebook, Google+, etc.)?

Answered: 4,674 Skipped: 114



Q25-A Social Media

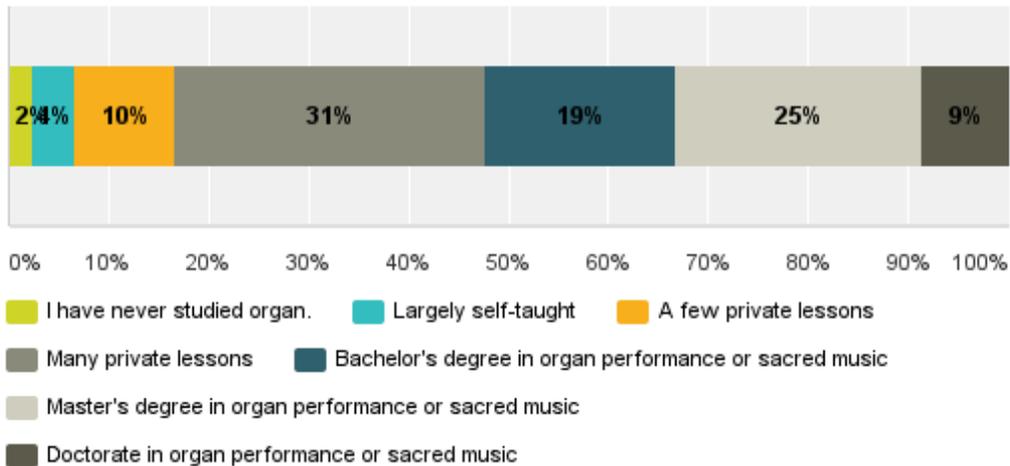
Q26 - TRAINING AS AN ORGANIST

Q26-A Question 26 asked respondents to choose the response that came closest to describing their training as an organist: no training; largely self-taught; a few private lessons; many private lessons; a bachelor's degree in organ; a master's degree in organ; a doctorate in organ.

One of the most surprising findings to come out of the survey was the 31% of members who describe their training as "many private lessons." They constitute the largest single category in terms of level of training. The second most frequent category was Master's degree, with 25% of respondents selecting that description. Thus the distribution of respondents is heavily weighted on either end of the level-of-training continuum.

Q26 Please select the category that comes closest to describing your training as an organist.

Answered: 4,704 Skipped: 84

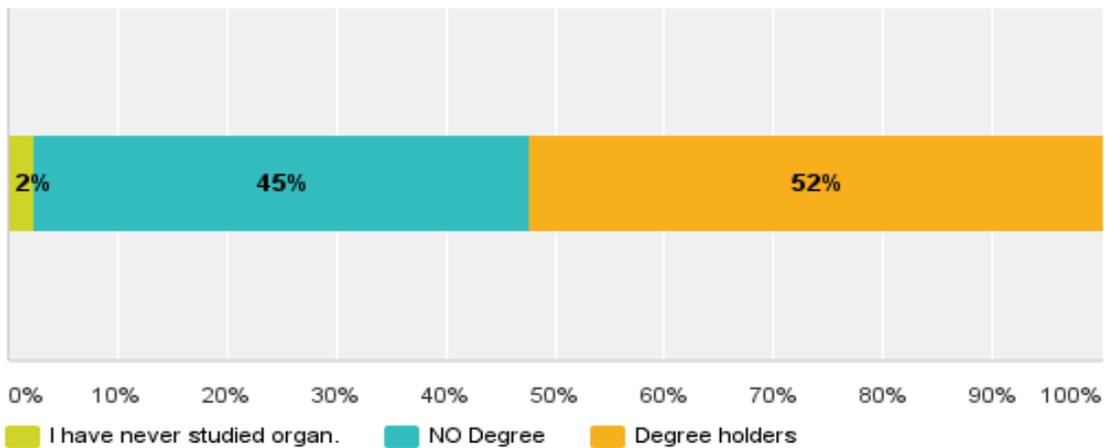


Q26-A Member Survey Respondents Training as Organist

When we aggregate all those members with less than a bachelor's degree in organ and all those members with a bachelor's degree or more in organ, we see that members who do not hold a degree in organ comprise 47% of the membership while those with a bachelor's degree or more comprise 52% of the membership. It is interesting that these two groups are approximately equal in size. Neither group could be said to be a minority. This dichotomous population will obviously have very different needs and interests. One-size-fits-all approaches to Guild programs and services will run the risk of not matching the needs of half of the membership.

Q26 Please select the category that comes closest to describing your training as an organist.

Answered: 4,704 Skipped: 84



Q26-B Aggregated +/- Academic Degree in Organ

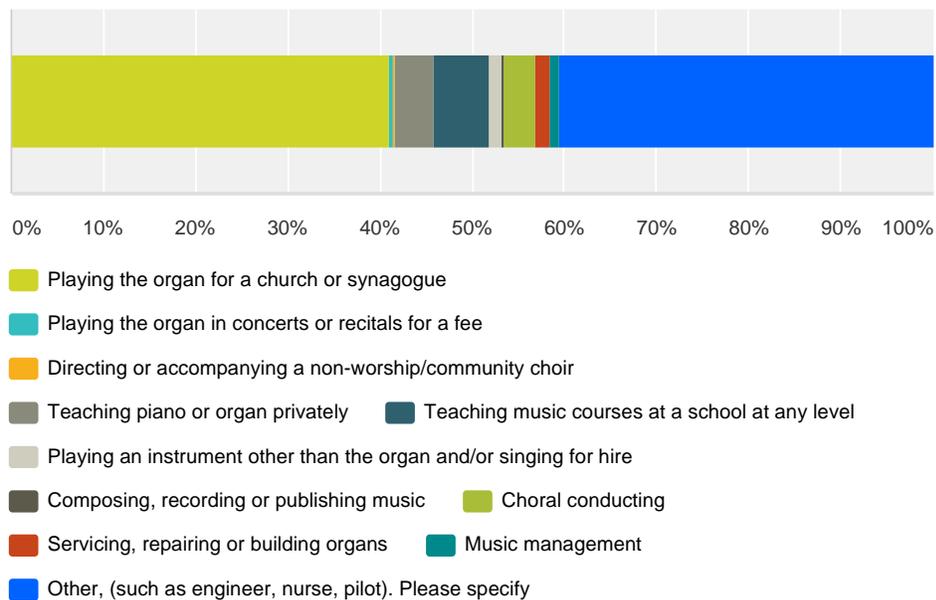
Reflecting on the very different levels of training of the members of the AGO, Councillors may wish to consider fashioning two-track approaches reflecting these differences. In particular, the relevance and feasibility of the AGO's mainstay certification programs as currently structured should be examined in the light of these findings. How could the program be tailored to meet the needs of members who do not hold degrees in organ, remembering that they comprise half of Guild membership? Could collegiate level courses count towards AGO certification?

Q29 - How Guild Members Earn Their Income

84% of respondents received financial compensation for playing the organ in a church or synagogue last year, *i.e.*, the overwhelming majority of Guild members are professional church organists. 51% reported that they were paid to direct a choir. A third taught piano or organ privately; another third played an instrument other than the organ for hire. 23% reported doing other professional or non-music-related work.

Q30 Which activity generates the largest percentage of your income?

Answered: 4,452 Skipped: 336



The AGO is just about equally divided between people who make most of their income playing the organ and people who do not. On the one hand, 41% of respondents report that they generate the highest percentage of their income by playing the organ for a church or synagogue. On the other hand, another 41% report that they earn most of their income through *other* activities. Looked at another way, a majority (59%) of members derive their principal source of income from activities other than playing the organ in a church or synagogue.

Responses to Q 29 and Q 30 point out some interesting characteristics of AGO members. They are overwhelmingly *professional church organists*, in that 84% are paid for their services. But *only 41%* of members derive their principal income through playing the organ at a religious institution.

Q32 - PROFESSIONAL ACTIVITY

88% of members report having taught organ lessons, played the organ for at least one service or played a recital in the last year. This lines up with the finding of Q29, in which 84% of respondents indicated they have been paid to play in a church or synagogue in the last year.

AGO members appear to remain active as organists throughout their lives. About 80% of members born in the 1930s (age 76-85) report having taught organ lessons, played at least one service, or played a recital in the last year. This finding suggests (Q32-B) that members retire from organ playing very, very late in life, if at all.

Q37 - TYPE OF INSTRUMENT PLAYED PROFESSIONALLY

46% of members report playing an electro-pneumatic instrument; 24% play an electronic/digital instrument; 15% play a mechanical action instrument, and 9% play an electronic/digital-pipe hybrid.

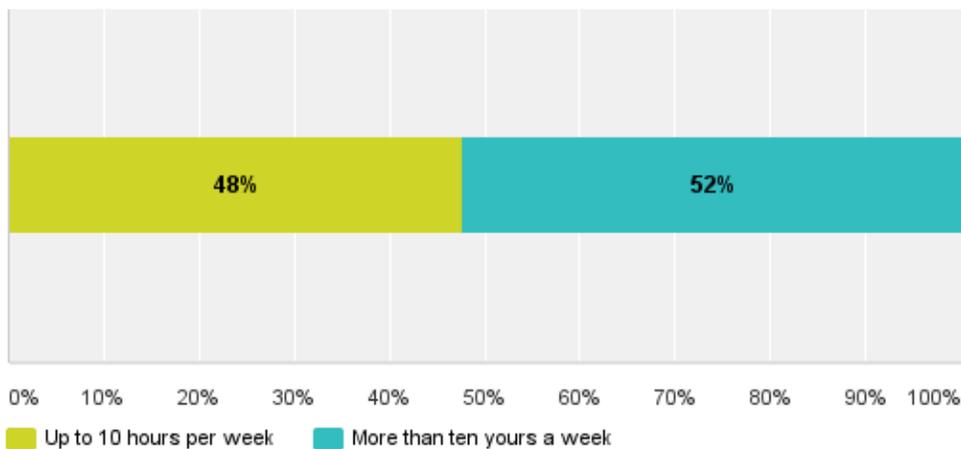
By cross-tabbing instrument type with training as an organist, we see that close to 40% of members who are self-taught or have had just a few lessons play electronic/digital instruments. The prevalence of electronic/digital instruments decreases with advanced degrees: only 11% of members with a doctorate in organ play an electronic/digital instrument. Electro-pneumatic instruments are most commonly played by members with college degrees in organ: Bachelor's 47%; Master's 55%; Doctorate 56% respectively. Members with Master's and Doctoral degrees are most likely to play a mechanical action instrument—18% and 24% respectively.

Q39 - HOURS MEMBER SURVEY RESPONDENTS WEEKLY **EMPLOYMENT AS AN ORGANIST**

Only 15% of members report being employed 40 or more hours a week as an organist. More than three times as many members (48%) are employed as an organist 10 hours or less each week. 19% work 10-19 hours. 12% work 20-29 hours; 6% work 30-39 hours a week.

Q39 Over the last year, approximately how many hours a week have you been employed as an organist?

Answered: 4,113 Skipped: 675



Q39-B Member Employment Up to 10 Hours per Week Compared to Aggregated >10 Hours a Week

In assembling chart 39-B we aggregated all responses above 10 hours a week. The chart helps us see that close to half of all AGO members are employed up to 10 hours a week.

By cross-tabbing hours of employment with gender, we see that male members are more than twice as likely to be employed full-time as female members.

By far the largest number and percentage of members now holding full time positions were born in the 1950s. This cohort ranges in age from 56-65. As these organists retire over the next 15-20 years, organists born in later cohorts may see a large number of full-time positions coming available.

Members with a doctoral degree in organ are almost three times as likely to be employed full-time as members with a bachelor's degree in organ.

Q41 - YEARS SERVED AS ORGANIST AT A RELIGIOUS INSTITUTION

58% of members report having served 31 or more years as an organist at a religious organization. Only 14% of members have served as an organist for less than 10 years, i.e. 86% have served as organists at religious institutions for more than 10 years. These statistics may be helpful to AGO leaders charged with delivering educational materials to members. Whatever their skill levels, AGO members have been discharging their duties as church organists for a long, long time. They are veteran organists. Only 7% of members have served as church organists for less than 6 years.

Q42 - MEMBERS CURRENTLY PLAYING AT A RELIGIOUS INSTITUTION

82% of members currently play the organ at a religious institution. The percentages remain remarkably high even in the oldest cohorts. This statistic should remove any doubt as to the importance of and relevance of sacred music to Guild members, who are overwhelmingly church organists. It is worth noting that more than 90% of members born in the 1980s currently play the organ in a religious institution.

Q44 - DENOMINATIONS SERVED BY MEMBERS

25% of members reported that they serve in an Episcopal church. Another 25% serve in a Lutheran church. 23% serve in a Roman Catholic church, 21% serve in a Presbyterian Church, and 19% serve in a Methodist Church. All other denominations are represented by 10% of members or less. Thus we can see that the AGO is primarily made up of members serving four mainline Protestant denominations and Roman Catholicism.

Q45 - YEARS AT CURRENT RELIGIONS INSTITUTION

42% of members have been at their current job for 11 or more years. Members who have been in their current position for 10 years or less are about equally distributed between those who have been in place 2 years or less, 3-5 years, and 6-10 years. These percentages remain fairly constant in all AGO regions and in all levels of training as an organist.

Q51 - MEMBER RESPONDENTS DIRECTING MUSICAL ENSEMBLES

46% of member respondents report that they direct a musical ensemble. Music degree-holding members are significantly more likely to direct an ensemble: bachelor's 51%; master's 61%; doctorate 59%. This finding suggests that programming in the choral area will be of particular interest to members with the greatest academic training and much of it should be geared to the Master's level member.