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Symphonies Adrift

15 orchestras in search of a bigger audience

By Alan Brown and John Bare

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Study Note

The 15 orchestras that participated in the Knight Foundation's *Classical Music Consumer Segmentation Study* were the Brooklyn Philharmonic Orchestra, Charlotte Symphony Orchestra, Colorado Symphony Association, Detroit Symphony Orchestra Hall, Fort Wayne Philharmonic Orchestra, Kansas City Symphony, Long Beach Symphony Association, Louisiana Philharmonic Orchestra, New World Symphony (Miami Beach), Oregon Symphony Association, the Philadelphia Orchestra Association, Saint Louis Symphony Orchestra, Saint Paul Chamber Orchestra, Symphony Society of San Antonio, and the Wichita Symphony Society.

The study involved a national telephone survey conducted in March 2001, as well as a series of comparable research efforts in each of the orchestras' communities. In each market, data gathering included an analysis of the orchestra's customer data file, a general population telephone survey of 750 adults conducted between August 2001 and March 2002, and a postal survey of orchestra ticket buyers conducted between August 2001 and February 2002. Additionally, focus group discussions were held with various ticket buyers and prospective buyers during November 2000 in select communities. The full report for the study is available on the Knight Foundation's web site at www.knightfdn.org.

In funding this study, the Knight Foundation sought to create an information resource not just for the participating orchestras, but for the entire orchestra field. The datasets are large and hold a great deal of potential value to the field and to the arts industry in general.

To encourage and facilitate further analysis, the three quantitative data files have been archived in electronic format (as SPSS data files) at the University of North Carolina's Odum Institute for Research in Social Science. These include the public telephone survey of US adults (N=2,200); rolled-up data file from 15 market-area public telephone surveys (N=11,318); and rolled-up data file from ticket buyer postal surveys (N=10,104). The files may be accessed through Odum's electronic catalog at www.irss.unc.edu.

symphony orchestras are adrift in a sea of classical music consumers who rarely, if ever, attend live orchestra concerts.

Roughly 10 to 15% of Americans have what might be termed a close or moderately close relationship with classical music, and again as many have weaker ties to the art form. Yet only half of those who express the very highest levels of preference for classical music concerts actually attend, even infrequently (see Figure 1).

In 2000, the John S. and James L. Knight Foundation, in partnership with 15 American orchestras, commissioned a two-year study as part of the foundation's decade-long, $10 million Magic of Music initiative. The mixed-method *Classical Music Segmentation Study* included nearly 25,000 interviews and is among the nation's largest ever discipline-specific arts consumer studies.

Although its purpose is market research, the *Classical Music Segmentation Study* offers rich insights into the ways in which Americans think about and absorb this cultural experience. Results offer a sweeping view of an art form in transition and orchestras increasingly detached from their potential customers.

hen consumers talk about "classical music," they speak not only of live orchestra concerts but also of the music they hear in film scores, musical theater performances, ballets, and even on television during skating competitions and advertisements.

Mass culture has assimilated and appropriated classical music in ways that no one imagined even 20 years ago. To the horror of some and the glee of others, some cell phones may be programmed to ring to the tune of Beethoven's *Für Elise* or another snippet of classical melody. With its Turbo Tax software, Intuit distributes a free CD compilation called "Relaxing with the Classics" (under license agreement with BMG)—music to calm your nerves by, evidently, while doing your taxes.

Radio, the study finds, is the dominant mode of consumption of classical music, followed by recordings and then, in last place, live concerts. Among daily listeners of classical radio, approximately one-third have never attended a concert by their local Magic of Music orchestra.

Given the many ways that consumers fit classical music into their lives, it's easy to understand how a third or even a half of Americans might have a casual relationship with classical music. This does not mean, of course, that they are ready to buy an orchestra ticket. But it does mean the seeds of affinity for classical music are widely sewn.

timulating creative expression and enrichment through classical music and other art forms is a quality-of-life issue for communities. Classical music cannot survive without musicians, conductors, composers, donors, civic leadership, teachers, students, record labels, radio hosts and listeners—and, of course, audiences for live concerts.

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Figure 1

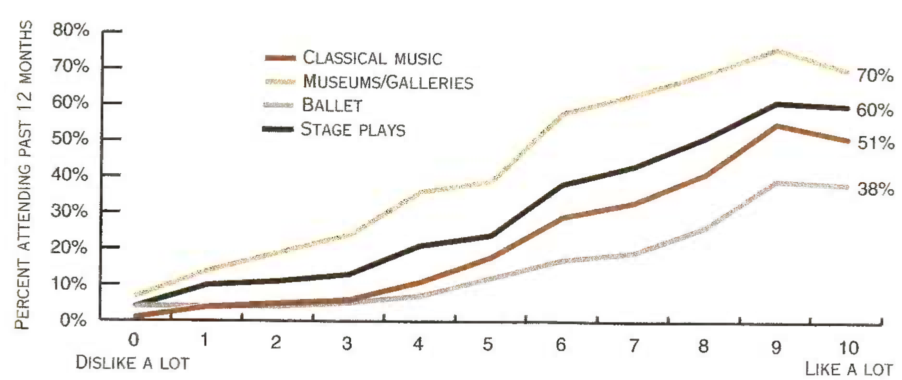
Attendance Rates Only Middling for Classical Music's Biggest Fans

Questions:

Now I'd like to ask how much you like or dislike a few different kinds of cultural activities. Use a scale of 0 to 10, with 0 meaning that you dislike it a lot, and 10 meaning that you like it a lot. In general how much do you like or dislike [attending classical music concerts/visiting art museums or galleries/attending ballet performances/attending stage plays]?

Did you visit an art museum or gallery during the last 12 months?

With the exception of elementary, middle, or high school performances, did you attend [a classical music concert/a ballet performance/a stage play] in the last 12 months?



LIKE/DISLIKE	CLASSICAL	MUSEUMS	BALLET	STAGE PLAYS
0	1%	7%	1%	4%
1	4	14	4	10
2	5	19	4	11
3	6	24	5	13
4	11	36	7	21
5	18	39	12	24
6	29	58	17	38
7	33	63	20	43
8	41	69	26	51
9	55	76	39	61
10	51	70	38	60

Note: Data are combined from telephone surveys conducted in each of 15 orchestras' communities (see study note on p. 13 for details).

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The Knight Foundation study comes at a time when concert attendance has been relatively flat or declining in some cities, and many symphonies are facing increased financial pressure, due in part to the struggling stock market's effect on endowments and donations. Some of the orchestras that participated in the study are experiencing significant financial shortfalls, or are in various stages of climbing out of debt.

Across the 15 markets, about 27% of adults are prospects for the orchestras. The rest have so little interest in classical music that they cannot be considered likely customers.

The bottom line: the 15 orchestras attract somewhere between 2 to 4% of adults in their communities on any sort of a regular basis. We call these people "Captured Prospects." All are current subscribers or single-ticket buyers who attended more than once in the preceding year. The subscribers tend to be white, wealthy and older.

Another 15% are "Low Frequency Alumni" of the orchestras studied. This category includes consumers who have been to a concert by one of the orchestras at some point in their lives but who are not currently attending or are attending infrequently. We define them as prospects because they've had a trial experience with the orchestra at some point as adults.

An additional 8% are "Uninitiated Prospects." These individuals are relatively sophisticated about classical music but have never attended a concert by the local orchestra, even though some of them have friends and family who go.

ome orchestras have had a broad impact in their communities. For example, a third of respondents to the St. Louis-area general population telephone survey said they had attended a concert by the Saint Louis Symphony Orchestra. Similarly, the Wichita Symphony Orchestra, Fort Wayne Philharmonic, Detroit Symphony Orchestra and Oregon Symphony had reached at least a quarter of adults in their respective markets. Orchestras have also accumulated large numbers of Low Frequency Alumni.

Close ties to their local orchestras are twice as strong among subscribers as among single-ticket buyers. Across the 15 orchestras, 71% of subscribers in the study agreed a lot that the orchestra deserved their loyalty, but the figure dipped to 42% for former subscribers and 35% for single-ticket buyers who had never subscribed.

> "Interest in classical music—broadly defined—looks healthy. Yet orchestras are struggling to remain relevant in a rapidly evolving cultural landscape."

Ticket buyers in these cities experienced their orchestras quite differently. Single-ticket buyers to the Brooklyn Philharmonic could not look more different than single-ticket buyers to the Fort Wayne Philharmonic in terms of sophistication, experience level and frequency of attendance. Yet the tactics used to attract them—relying heavily on subscription marketing—are strikingly similar.

Subscription campaigns generate the cash flow and sales volume that orchestras need to survive. Such campaigns keep per-ticket marketing costs low, and this efficiency is appealing. However, the study brings to light two of their major flaws. First, subscription marketing acts to filter out younger adults, who tend to be more spontaneous in planning their cultural activities. About half of subscribers across the 15 markets were age 65 or older. One in six was 75 or older. Moreover, subscribers were half as likely as single-ticket buyers to have children in the household (12% versus 23%, respectively).

Second, the lion's share of prospects for orchestras—including many who were highly knowledgeable about classical music—were simply not interested in making subscription commitments. Less than 10% of Uninitiated Prospects were highly inclined to subscribe. Within the base of single-ticket buyers, more than one in three were former subscribers who had opted out of subscription packaging but remained in the audience.

erhaps the biggest challenge facing the orchestra field, then, is defining customer relationships that do not require advance commitment or large, lump-sum payments—and then finding new ways to build loyalty among single-ticket buyers, even those who may attend just two or three times a year.

While the price of tickets is a factor, it's usually not the first barrier among those predisposed to attend. People routinely pay more for rock concerts than what orchestras charge for front-row seats. It is difficult to research price, because people won't tell you they are willing to pay more, even if they are. In fact, many subscribers make donations over and above the cost of the tickets.

The research suggests, however, that there are plenty of upscale consumers, many of them classical music devotees, who don't want to subscribe but who would be willing to pay a premium for good seats on short notice. The problem is they are often treated like stepchildren until they sign up. In addition, by selling subscriptions as a hedge against the future scarcity of good seats, orchestras perpetuate the myth that they are always sold out. In some cities, consumers have this idea so deeply inculcated in their consciousness that they never even inquire about available tickets.

Orchestras are in competition with other forms of entertainment for the consumer dollar. More artistic creativity is called for. "Phantom of the Opera" and "Riverdance" became blockbuster hits in the musical theater world. Why don't more orchestras perform special concerts once or twice a year in large concert venues, where so many people go regularly for other types of music?

Also, people who describe themselves as casual listeners of classical music want to develop a better appreciation for the music but can't do it by themselves. Pre-concert lectures and annotated program notes appeal mostly to those who are already knowledgeable about the art form. Some innovative approaches are clearly needed.

Without fundamental changes, subscription marketing will continue to be the sweet honey that sustains orchestras and a slow-acting poison that impedes their long-term sustainability.

he *Classical Music Segmentation Study* found that nearly six in ten US adults would accept a free ticket to a classical concert by a symphony orchestra, if offered by a friend or family member. So why are some orchestras having difficulty filling their halls? What's keeping orchestras from attracting the next 2 or 3% of adults in their communities?

One answer is that different people like different amounts of social lubrication in the concert experience.

A serious examination of the large base of potential classical consumers reveals that for many, if not most, attendance is triggered by an invitation from a friend or family member.

Sixteen percent of potential classical consumers identify themselves as "Initiators"—people who instinctively organize cultural outings for their friends. But nearly six in ten say they are "Responders"—people who are much more likely to attend cultural outings if someone else invites them.

The study paints a picture of a largely invisible "shadow audience" for most orchestras. These are people who have attended concerts but who did not buy their ticket and may not have participated in the purchase decision process. Our community surveys indicate that, on average, 40% of those who have ever attended a concert by their local orchestra did not—and have never—purchased their ticket.

Focus group research further suggests that the absence of social context is a major barrier to attendance. We heard from adults whose spouses have different musical tastes—one likes classical music and the other doesn't. Neither goes to the symphony. We also heard from single adults who are new to their cities and not yet linked to a social network of concertgoers. In both cases, the potential demand for classical concerts remains latent without an external prompt for attending.

ur findings raise both hope and concern. Interest in classical music—broadly defined—looks healthy. Yet orchestras are struggling to remain relevant in a rapidly evolving cultural landscape. They need to find ways to respond competitively to marketing challenges and social pressure.

Great Britain, for instance, already has its "Opera Babes"—thirtysomethings Rebecca Knight and Karen England catapulted to fame and fortune when a producer found them busking in Covent Garden's Piazza and hired them to perform at World Cup soccer matches. Reuters called them "the new pin-ups of British opera."

A willingness to engage fans of the music in various settings and in multiple styles is a starting point. This does not necessarily require a compromise on artistic standards, at least from the audience's perspective. But it does mean taking risks—both financial and artistic—on both sides of the stage.

Some orchestras, especially those in the large metropolitan markets, may rededicate themselves to traditional symphonic repertoire, scale themselves appropriately and find sufficient demand for the foreseeable future. Others may choose to reorganize as community-based music organizations with a somewhat broader mission to present and produce a wider range of programs across various genres of music, drawing on the talents of their own musicians, perhaps, in new ways. This will require a great deal more flexibility in the services of musicians.

he only certainty is change. New generations and new immigration are putting a new face on culture, and classical music—no matter how well preserved—cannot escape these forces.

In the underground clubs of Paris and New York, young, new faces are reinventing classical music selections such as *The Flower Duet*, borrowed from Leo Delibes's 119-year-old opera, *Lakmé*, and remixed into a techno dance anthem. Perhaps the thumping new beat will awaken orchestras to a new opportunity for the concert hall: kids dancing to their music.