

BRIDGING THE GAP:

Innovations to Save Our Orchestras

A continuing discussion of issues, practices and changes in symphony orchestra organizations.



This is the third in a series of issues briefs designed to continue the discussion we began a decade ago with partners in the symphony orchestra field in the John S. and James L. Knight Foundation's Magic of Music initiative.

We encourage you to send comments about these topics and suggestions for future issues in this series to publications@knightfdn.org or visit music.knightfdn.org.

Future issues will explore lessons learned and applied by the 15 participating orchestras as they worked in partnership with each other.

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Education may not be the answer. While orchestras everywhere are expanding their educational programs in an effort to encourage concertgoing and attract new audiences, research indicates that in the long run education in itself does neither. Other strategies – such as nontraditional concert formats and performances that link classical music to other art forms – are more effective ways to expand and diversify audiences, energize the concert experience and increase ticket revenues over time.

Innovations to Save Our Orchestras: Agonizing but Successful Change

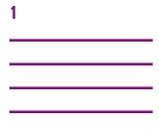
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Philliber Research Associates

Since 1994, Knight Foundation has invested more than \$10 million to help American symphony orchestras strengthen the relationships with their audiences, thereby strengthening the orchestras as institutions. The foundation's Magic of Music¹ symphony initiative has funded innovative programming, research and efforts aimed at organizational change at 15 U.S. orchestras. The initiative's goals include: (1) supporting programs that produce a demonstrable increase in the ticket-buying audience; (2) helping orchestras develop a stronger sense of connection with new and potential audiences; (3) enhancing relationships among musicians and orchestras, audiences and communities; and (4) developing a clearer understanding of the market dynamics in which symphony orchestras seek to develop and nurture audiences.

Research and evaluation have been key aspects of the initiative. In 2000, the foundation retained the cultural research firm of Audience Insight LLC to conduct the *Classical Music Consumer Segmentation Study*, the largest discipline-specific arts consumer study ever undertaken in the United States, with nearly 25,000 completed interviews and surveys, mainly in the markets of Magic of Music orchestras.

The foundation also engaged evaluation consultant Philliber Research Associates to undertake site-specific evaluations of Magic of Music activities and track the initiative's progress toward its goals. This research is one of the most systematic efforts among orchestras to date to measure audience development efforts. This brief is based on preliminary results of Philliber's evaluation research as presented to participating orchestras in the spring of 2003.



¹The name "Magic of Music" is used with permission of The Magic of Music Inc., which creates special moments through music for thousands of critically/terminally ill and handicapped children and adults throughout the United States.



Magic of Music Theory of Change

In practice, the Magic of Music initiative is built on the following concept of change. Orchestras use a range of audience development strategies – including audience education, innovative programming, concert enhancements and community outreach – in order to:

- reach various targeted prospect groups, including younger audience members, members of diverse racial and ethnic groups, and residents in outlying geographic areas;
- inspire more positive perceptions of orchestras and concert experiences in the interim;
- eventually increase concert attendance and ticket buying.

For the past three years, orchestras participating in the Magic of Music have collected audience surveys and provided ticket sales data to test the validity of this concept.

Survey data from thousands of audience members suggest that current audiences enjoy the classical music concerts presented by their local orchestras. Most audience members feel “connected” and “committed” to their orchestras and believe their orchestras are important parts of their communities. However, across the orchestras, subscription sales to standard classical series are declining. While single-ticket sales to these series are increasing for some orchestras, overall increases are not making up for the loss of subscriptions.

By mid-2003, enough data had been collected to make preliminary observations regarding what works to attract and engage classical music audiences. While other innovative activities await further evaluation, we have enough data, collected over time, to support general observations about audience development strategies in three areas.

- *Nontraditional and enhanced concerts* provide classical music performances in innovative formats, integrating other art forms, themes from popular culture and other types of expression and communication.
- *Relational activities* seek to initiate and nurture relationships in the community in order to build public support and offer gateway experiences that introduce an orchestra to future ticket buyers.
- *Educational strategies* use adult education to strengthen people’s knowledge and connection to classical music.

In addition to reporting evaluation findings about these areas, we offer a commentary about the spirit of this initiative and the struggles of these orchestras to preserve what is best about their work while making necessary and sometimes painful changes. This commentary goes beyond our data somewhat, drawing on our wider experience with these orchestras

as they have worked to make their organizations thrive. To separate commentary from data, we confine this more editorial content to commentary boxes.²

Nontraditional and Enhanced Concerts

Ten Magic of Music orchestras have sought to develop audiences through the production of nontraditional and enhanced concert experiences. These concerts seek to reach new and younger audiences by integrating programmatic themes, other art forms and other modes of communication to present classical music in alternative formats. This was not a strategy embraced easily by everyone. (See Box 1.)

Box 1: The Difficulty of Real Change

In our evaluation work with these orchestras, we have found some of them absolutely gleeful at the challenge of making change – embracing experimentation and then waiting eagerly to see if it worked. But others have only grudgingly made changes and only with a “bait-and-switch” mentality.

“We’ll do this foolish thing in the park with bad acoustics and let’s hope that sells enough subscriptions to our *real* concerts so we can get back into our tuxedos in the concert hall and away from these mosquitoes and people who eat while we play!”

As the initiative progressed, most orchestras got over that mentality. Some did not.

Yet evaluation data suggest that these enhanced and nontraditional concerts may be effective in attracting new and different audiences, providing enjoyable and engaging concert experiences, and increasing ticket revenues over time.

Attracting New Audiences

Diverse approaches to nontraditional programming are bringing new audiences to Magic of Music orchestras. The Brooklyn Philharmonic Orchestra, for example, presented a series of enhanced chamber music performances called *Music Off the Walls* at the Brooklyn Museum of Art, with musical programs and educational content linked to themes of museum exhibitions. According to audience surveys and attendance data, approximately half of the audience members at these events had never heard the orchestra perform before.



²The commentary boxes in this article are excerpts from an address given by Dr. Susan Philliber at the Magic of Music annual retreat in 2003.



Other enhanced concerts presented by Miami's New World Symphony and the Louisiana Philharmonic attracted similar percentages of first-time attendees, while percentages of new audience members at nontraditional performances of the Fort Wayne Philharmonic, Colorado Symphony, Wichita Symphony and Long Beach Symphony ranged from 12 percent to 15 percent. These figures compare to an estimated 5 percent of first-time attendees in audiences for standard classical concerts.

Attracting Different Audiences

Nontraditional concerts also appear to be successful in reaching young adults, age 45 and under. The Fort Wayne Philharmonic's *Unplugged* concerts feature familiar classical repertoire that illustrates themes associated with popular culture. A performance called *Surviving the Symphony*, for instance, was linked to the television show *Survivor*. *Unplugged* concerts also offered inexpensive tickets and casual concert atmospheres, video enhancements, conductor commentaries, guest hosts and after-concert parties. Survey data collected from three seasons show that about one-third of audience members are under the age of 46. Similar percentages were observed for *Gumbo a la Freedom* concerts by the Louisiana Philharmonic and the Colorado Symphony's *Passion of Flamenco*.

Some enhanced concerts appear to attract more ethnically diverse audiences. The New World Symphony's *Piazzolla and the Passion of Tango* and the Long Beach Symphony's performances at the Museum of Latin American Art attracted higher than usual percentages of Latino audiences, while Louisiana Philharmonic performances with African-American themes attracted higher percentages of black audiences.

Providing Enjoyable and Engaging Concert Experiences

Across audiences at Magic of Music events, nontraditional concert enhancements generally received positive ratings. Fort Wayne's *Unplugged* audience members rated as highly satisfactory musical performances, musical selections, from-the-stage commentary and concert themes such as *Classically Incorrect* and *Born in the U.S.A.* Audience members in Wichita, Denver, Long Beach and Miami (New World) gave high ratings to Latin American dancers and instrumental soloists. But responses were mixed. In some but not all markets, subscribers to more traditional concerts responded less favorably to concert enhancements than did other ticket buyers. (See Box 2.)

Box 2: Pandering to Your Base

Some orchestras have complained that the consumer doesn't even like it when they add special enhancements. The regular and traditional subscription ticket buyers may get annoyed. A friend recently attended an opera on Broadway. She said they tried so hard to make it accessible to the opera unwashed that they had ruined it. "It was in English," she howled, "and it was contemporary language, not even Shakespearean!"

Here we need the genius of Karl Rove, President Bush's political adviser. He knows the president must keep pandering to his far right base but also knows they aren't enough. He works every day to keep them happy while attracting new Bush fans from the wider world. Would that orchestras would get as good at this as he is.

Increasing Ticket Sales and Building Revenues Over Time

Although nontraditional concerts are new for many orchestras, there is a growing body of evidence that suggests these performances can lead to increased ticket sales over time, reversing trends observed for more traditional classical concerts. The Oregon Symphony's *Nerve Endings* series, for example, offered classical concerts featuring special themes; the integration of other art forms, including drama, art, dance and visual arts; and innovative concert settings.

Since *Nerve Endings'* inaugural season (1997-98), sales to both subscribers and single-ticket buyers have steadily increased each year. During the 1997-98 season, approximately 1,500 households bought tickets; by 2001-02, the number had more than doubled. While subscription sales for the Oregon Symphony's classical and pops series steadily declined over time, subscription sales for *Nerve Endings* bucked the trend with sizable increases; revenues have increased fivefold since its first season. Similar trends in revenue and ticket sales have also been observed over the long term for Fort Wayne's *Unplugged* series, and in the first season of the Brooklyn Philharmonic's enhanced concert program.

To date, there is mixed evidence about whether these concerts would lead their ticket buyers to more standard orchestral fare, including classics or pops concerts. For example, the Oregon Symphony reports that, over time, nearly 700 subscribers to its standard classical series began their engagement with the symphony through *Nerve Endings*, but this transfer of audience does not yet appear to have taken place in Fort Wayne or other communities.



More time and information are needed to determine the longer-term impact of these alternative concert formats on orchestral programming and concert audiences. Nonetheless, early results suggest they are worthwhile experiments in audience development. The findings are consistent with conclusions from the Audience Insight study, which suggest that “increasing attendance – or at least staving off a decline in attendance – may require a loosening of the definitional boundaries around ‘classical music’” and that “some orchestras, especially those in smaller cities, might re-examine how they define their constituencies and how they select, package and deliver their musical products.” (See Box 3.)

Box 3: Different Products for Different Audiences

Think about the Coca-Cola Company for a minute. Their desired outcome is quite clear. They want you to drink as much Coke as possible. And when you don't drink enough Coke, they never say you are unmotivated, lack self-esteem, have too little classical education or are stupid. Instead, they just offer it to you another way.

“How about Coke with no calories? Want it now? Here's a new red can with 'Always' on it. Want it now? We've got Dr. Pepper here. You might like that. We're having a sale on Coke. Want to buy it now?”

What are orchestras selling? We know it's something more worthwhile than Coke, though alas, not as popular. Coke will do almost anything, change the product in almost any way, but we have feelings about that. We don't want to alter the musical 'product' any old way. It's almost a moral question, isn't it?

Relational Strategies

Most Magic of Music orchestras sought to develop audiences through free concerts presented in one or more community locations. The purpose of these concerts was to create and nurture relationships in the community in order to build positive public perceptions and offer initial experiences to potential ticket buyers.

Free concerts offered in multiple venues across the St. Louis region are the cornerstone of the St. Louis Symphony Orchestra's Magic of Music activities. Other orchestras offering free concerts include the New World and Charlotte symphonies. During the past two years, the Philadelphia Orchestra has also experimented with free outdoor concerts.

Evaluation data suggest that free community concerts may be effective means of introducing community residents to their local or regional orchestras, providing gateway experiences for new subscribers and changing public perceptions about orchestras.

Introducing the Local or Regional Orchestras

The St. Louis Symphony offers free concerts in multiple venues across the St. Louis region. Programming includes chamber concerts offered in urban, suburban and rural park settings; choral and instrumental music presented in African-American churches; and informal chamber concerts at Symphony Hall in which audience members sit onstage with musicians. Most of these events are planned and presented by SLSO musicians. Each year SLSO Community Partnership Concerts serve more than 1,000 people across the St. Louis region; three-quarters are not current ticket buyers. Similarly, a concert presented by the Philadelphia Orchestra in a New Jersey public school attracted an audience in which approximately 45 percent had never before attended a concert by the orchestra.

Serving as Gateway Experiences for Prospective Subscribers

Preliminary evidence indicates that free concerts may lead to ticket buying and even subscribing *over the long term*. Among 110 first-year subscribers to the Charlotte Symphony's classical series, 61 percent had previously attended a free CSO concert, while 30 percent had attended a low-cost neighborhood concert. Those who had attended free or low-cost neighborhood concerts were significantly more likely to agree that they felt a sense of connection to the orchestra than those who had not attended such events. Other orchestras are now improving their tracking mechanisms to measure attendance at free events and track future ticket buying by these audiences.



Changing Public Perceptions of the Orchestras

Survey respondents at the Philadelphia Orchestra's New Jersey concert were asked if the event had changed their attitudes toward the orchestra in any way. More than one-third said the concert improved their perceptions by demonstrating that the orchestra is accessible to a wide range of people (including those from varied income levels), is willing to reach out to outlying geographic areas, and provides performances more enjoyable than anticipated.

Taken together, these data suggest that free or low-cost community events may encourage attitudes that lead to ticket buying, suggesting that these events may also support marketing and public relations objectives.

Educational Programs

A number of Magic of Music orchestras have sought to develop audiences through adult education strategies designed to increase knowledge and understanding of classical music and sometimes of the orchestra itself. Strategies include media outreach through Web sites or distribution of CD-ROMs, preconcert lectures, adult education classes and published materials such as expanded program guides or program notes.

Evaluation data suggest that some educational strategies may help increase audience members' perceptions of their knowledge of classical music and provide enjoyable experiences related to classical music.

However, there is *no evidence* that educational strategies attract new audience members, increase ticket buying or improve participants' overall perceptions of their classical music knowledge. In fact, while participants in educational programming respond favorably, attendance data suggest that participation in these programs tends to decline over time.

Many orchestras today are expanding education programs. Why don't they work?

Evaluation research indicates that participants in educational activities tend to be well-educated older adults. Most are already subscribers or single-ticket buyers. This finding is consistent with Audience Insight's finding that "preconcert lectures and annotated program notes appeal mostly to those who are already knowledgeable about the art form. These devices are not long-term solutions ... for casual listeners."

Moreover, audience members' self-ratings of classical music knowledge do not appear to improve following participation in educational activities. In some cases, ratings even go down.

Even long-term educational strategies don't seem to increase ticket buying, among either new prospects or current ticket buyers. There is little evidence that education programs encourage subscription renewals.

Overall, evaluation results from Magic of Music orchestras suggest that educational strategies are less effective than nontraditional and enhanced concerts in contributing to audience development and ticket buying. (See Box 4.)

Box 4: Can Education Produce Passion?

An orchestra board member recently said he thought people could develop appreciation, even passion, for any kind of music. When pressed about whether there were kinds of music he didn't exactly appreciate, he 'fessed up to some misgivings about country music of the whiny kind.

Do we think sending him to a few classes about country music, and where that whine comes from, will turn him into a fan? He will understand it better but his passion may not get ignited – the next time he is forced to listen to it, he will understand it but maybe not love it.

We may have the causation mixed up here. Those who already love classical music may be the ones most eager to learn more about it. Nothing in our orchestra data suggests that education is a good gateway experience. In fact, education may convey the wrong impression that lectures and study are required to enjoy classical music. It appears to be a good enhancement only for those already converted.

Implications

Survey data from thousands of audience members suggest that current audiences enjoy the classical music concerts presented by their local orchestras. Most audience members say they feel connected and committed to their orchestras and believe their orchestras are important parts of their communities.

However, across the country, orchestra subscription sales to standard classical series are declining. While single-ticket sales to these series are increasing at some orchestras, these increases are not making up for the loss in subscriptions. Ongoing audience development strategies are still needed to stem the steady flow of ticket buyers away from standard classical concerts.

Audience surveys and ticket sales data for orchestras participating in the Magic of Music initiative suggest that a number of strategies are making progress toward this audience development goal. These strategies include nontraditional and enhanced concerts and free community-based events.

These findings, together with findings from the Audience Insight study, suggest that today's orchestras may be misusing scarce funds by spending too much to please a shrinking subscriber base and not enough to attract newer audiences who may hold broader definitions of classical music.

For example, according to the Audience Insight study, "just 10 percent of potential classical consumers think of themselves as 'critical listeners' while 78 percent consider themselves 'casual listeners' and 11 percent say that they are 'uninterested listeners,' suggesting the vast majority of potential audiences are only casually involved with the art form." Similar results were found for single-ticket buyers, who are becoming more and more important in building and sustaining classical music audiences.

If, as identified by Audience Insight, approximately one in four adults is a potential orchestra ticket buyer, but only half of those who express the very highest levels of preference for classical music actually attend concerts, perhaps the Magic of Music initiative has provided clues for reaching these prospects. Preliminary evaluation results suggest that nontraditional classics concerts, enhanced by thematic programming and other forms of cultural expression, and free community events that promote orchestra accessibility, may help convert the other half of the *prospective* audience into the *paying* audience.

Box 5: What Can Orchestras Do?

To keep orchestras from going the way of the dodo bird, what can we do? At least three things seem useful.

First, be open to change – always lining up our passion and musical purity needs against financial necessities. Who knows? We might find something better than subscriptions to classical concerts.

Second, upgrade your information technology capacities. Orchestras need better software and hardware to track the bottom line. Some cannot yet track ticket sales accurately and certainly can't tell when they bleed audiences from one offering to another or when the composition of the audience changes. These are must-have business tools.

Third, keep an eye on the data that help you evaluate what you are doing. Make evaluation like bookkeeping and artistic planning – a regular part of the operation. And share those data with all your stakeholders. Musicians need information, too – maybe they need to know most of all. In looking at your data, be careful how you interpret it. If you lost only 3 percent of your audience this year while a peer orchestra lost 10 percent, don't feel too comfortable. In 10 years, they might be gone but you won't be in such great shape either with 30 percent of your audience missing.

Be bold in keeping the things that work, developing a clear rationale when you decide to keep things that are not profitable, and tweaking all the time to make things better.





The research report, *How Americans Relate to Classical Music and Their Local Orchestras*, is available, free of charge, in print and on Knight Foundation's web site.

Issues briefs Nos. 1 and 2: *Orchestra & Community: Bridging the Gap* and *Bridging the Gap: Orchestras & Classical Music Listeners* are also available in print (email publications@knightfdn.org) and in PDF format at music.knightfdn.org

The orchestras involved in Knight Foundation's symphony initiative include:

Brooklyn Philharmonic

Charlotte Symphony

Colorado Symphony

Detroit Symphony

Fort Wayne Philharmonic

Kansas City Symphony

Long Beach Symphony

Louisiana Philharmonic

New World Symphony

Oregon Symphony

Philadelphia Orchestra

St. Louis Symphony

St. Paul Chamber Orchestra

San Antonio Symphony

Wichita Symphony

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