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**THE AMERICAN SYMPHONY ORCHESTRA:  
RENEWABLE AUDIENCES OR A DYING INSTITUTION?**

**by**

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*To my sister, Jessica. Your talent as a cellist and your passion for music are a reminder to me of why I chose this thesis topic to begin with.*

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## Introduction

### The Death of the Symphony Orchestra?

It is the year 2103. Carnegie Hall is shut down. In its place stands a dance club which regularly features live rock bands played to capacity crowds. Classical music is something out of a high school history textbook and can only be heard on old compact discs which are preserved in university libraries. At some point in the mid 21<sup>st</sup> century, classical music was replaced by World and New Age Music. Symphony orchestras were thus no longer necessary. In other words, the symphony orchestra was dead.

**I**s this a likely scenario 100 years from now? The American public is constantly inundated with sob stories by respectable newspapers from *The New York Times* to *The Washington Post* bemoaning the aging of the orchestral audience and the imminent death of the entire institution itself. Orchestras are blamed for failing to attract younger audiences. Musicians and music-lovers complain that audiences at symphony concerts are much older than the population at large and that once this older generation dies out, it will fail to be replaced by a younger one. The diminishing quantity and quality of music education in American schools is said to also contribute to the problem of renewing symphony audiences for the future.

I will argue in this thesis, however, that although there is some truth to such statements, they are greatly exaggerated. Although orchestral concert attendance for

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adults 18 and over has decreased from 11.7% to 11.3% of the population in the last ten years, these numbers do not take into account multiple attendances by any one individual. The number of concerts purchased on an individual subscription has been declining from an average of more than twelve concerts per subscription twenty years ago to less than six today. This means that the number of different individuals attending at least one symphony concert a year has risen.<sup>1</sup> In other words, although the actual attendance figure has decreased, the audience base may in fact be broadening. In contrast to depressing stories about orchestras losing money and going bankrupt, the earned revenue for America's 1200 adult orchestras has increased 33% in the last ten years from \$582 million in 1991 to \$775 million in 2001.<sup>2</sup>

Although the current orchestral audience situation is not dire, there is always the possibility that it could worsen in the future. However, options for change in marketing strategies to raise audience turnout do exist for orchestras. The recent study on American orchestras and classical music by the Knight Foundation demonstrated that there is a large segment of the American population that is interested in classical music but which, nevertheless, does not attend concerts. The Knight study concludes that there is much potential for growth in audience building.

Symphony concerts have also always tended to attract a more mature audience in the past and will most likely continue to do so unless changes in marketing strategies and structure are undertaken. This is perhaps partly due to the lifestyle of the individual audience member. Younger audiences are indeed attending, but not as often as older audiences. However, as this thesis will show, attendance does not necessarily correlate

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<sup>1</sup> McAuliffe, Jack, Vice President and Chief Operating Officer, American Symphony Orchestra League (ASOL). Email to the author. 14 January 2003.; figures adjusted for population growth (US Census)

<sup>2</sup> *Ibid*; figures adjusted for inflation.

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with interest in attendance. Marketing strategies instituted by orchestras also affect the demographics of attendance. Although data show that a higher percentage of older concert-goers than younger ones subscribe to orchestra concerts, the percentage of younger concert-goers buying single tickets is actually higher than the percentage of older ones doing so. This may be evidence that the entrenched subscription marketing system of American orchestras is warding off younger audiences, not necessarily that younger people are not interested in attending live symphony concerts.

Due to the relative newness of the Arts Policy field (public arts policy in the US is only about 25 years old), data is scarce and often not collected in a similar methodological manner, making data collected from different sources difficult to compare. According to Philip Hart, “in the entire mass of data about the American orchestra, there is less concrete information about its audience than any other aspect.”<sup>3</sup> In this thesis, I have thus gleaned data from many diverse sources in an attempt to come to a cohesive conclusion. I first examined studies on the topic undertaken by sociologists and economists. In addition, I interviewed marketing directors from numerous orchestras directly. I also obtained data from the National Endowment of the Arts (NEA) 1997 Survey of Public Participation in the Arts and the Knight Foundation orchestra study data sets and examined them for information on the age of audiences.

The thesis is divided into four chapters. The first addresses the basic premise of this thesis—why symphony orchestras are important. Why should it concern the public if symphony orchestras lose audiences and “go out of business” in the future? The chapter will also address the context and background of the current symphony orchestra audience

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<sup>3</sup> Hart, Philip, *Orpheus in the New World: The symphony orchestras as an American cultural institution—its past, present, and future* (New York: W.W. Norton & Company, Inc., 1973), p. 385.

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situation. The second chapter examines past studies on the topic of orchestras and audiences, including the comprehensive Magic of Music Study undertaken by the above-mentioned Knight Foundation. In the third chapter, the thesis then analyzes data from eight American orchestras (The Philadelphia Orchestra, The Boston Symphony Orchestra, The Pittsburgh Symphony, The New Jersey Symphony Orchestra, The Atlanta Symphony, The Brooklyn Philharmonic, The Portland Symphony, and The Philharmonic Orchestra of New Jersey) and information garnered through individual orchestral market survey data and personal interviews with individual orchestra marketing directors. These eight orchestras differ in both geographical location and size of budget and prestige, which allow a better sense of the audience situation from all areas of the orchestral spectrum. More specific programs which certain orchestras are instituting to attract audiences and improve the quality of the audience will also be discussed. Chapter 4 analyzes data from the Knight Foundation, Cultural Policy and the Arts National Data Archive (CPANDA), and individual orchestral archives. It also addresses the classical music knowledge level of current and potential audience members, listening quality, and affects of programming contemporary works. The thesis will conclude with a summary of findings and policy recommendations for attracting more and especially a younger and more educated orchestral audience.

# CHAPTER 1

## An "Overture" to the Current Situation

"In the long history of man, countless empires and nations have come and gone. Those which created no lasting works of art are reduced today to short footnotes in history's catalog. Art is a nation's most precious heritage, for it is in our works of art that we reveal to ourselves, and to others, the inner vision which guides us as a nation. And where there is no vision, the people perish."

Lyndon B. Johnson<sup>1</sup>

"The legacy of ancient cultures that remains on the planet today is pretty much only what those cultures created in the way of the arts and architecture and literature and music...very little that has come down through the ages has not in some way filtered through something that we can all identify as the arts."

- Sherri Geldin, Ex-Director of the Wexner Art Center<sup>2</sup>

### 1.1 History and Context of the Modern American Symphony Orchestra

**D**espite ample evidence of the importance of the arts in defining the great civilizations of the past, Americans have, on the whole, treated the arts as something of marginal worth. Some view it as a luxury, something reserved for the rich and elite. Others see it as an unnecessary distraction. It is not considered a crucial necessity of life, and is often shuffled aside in

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<sup>1</sup> Larson, Gary O., *American Canvas: An Arts Legacy for our Communities*. (National Endowment for the Arts, 1997), p. 21.

<sup>2</sup> *Ibid.*

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debates ranging from talks on government funding of the arts to the financing of music education in public schools. Before going into detail about the question of orchestra audience renewability, it is important to clarify why this question needs to be answered in the first place. Does it really matter if an art form, which the majority of the American population possibly views as antiquated, untimely, and Euro-centric, slowly dies out? If there really is no demand for the art form, then why bother keeping it alive?

Even though, based on my research, there is little concrete evidence that classical music and the symphony orchestra are being swept under the carpet, it is still important to discuss the reasons why Beethoven and Stravinsky are important to American, or any other, civilization. It is also crucial to relate to the American public exactly why live performances by symphony orchestras are relevant and necessary to a civil society. According to a study done by the National Endowment of the Arts many American citizens fail to recognize the direct relevance of art in their lives.<sup>3</sup> This same frame of thought can also be witnessed in many of our nation's politicians. For example, New Jersey Governor James McGreevey recently proposed to completely eliminate all arts funding from the 2004 state budget. This situation depicts how the arts are often the first to be cut whenever difficult economic situations arise.

Part of the reason for this lack of interest in the high arts in the US is the cultural history and climate of the nation. For one, the US is a country built on the ideas of pragmatism, brute strength, and individualistic hard work. Thus, when the American public continually observes symphony orchestras and other arts groups requesting funding from both the government and corporate donors, it tends to come to the conclusion that the arts are perhaps impractical and weak for being unable to fund

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<sup>3</sup> *Ibid*, p. 13.

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themselves. This same frame of thought carries on into debates of public policy importance—for example, music education. One interviewee questioned on the importance of music education during a conference held on the symphony orchestra in 1986 responded that “kids should take part in sports; that’s natural, that’s the American way. Music’s not natural. It is something we’ve got from Europe.”<sup>4</sup>

Music is often seen as something petty and marginal. With this American, pragmatic frame of mind, sports and exercise are good for education and society because they instill a sense of competition in children, in addition to contributing to good health. Music, on the other hand, is thought to be lacking in such qualities. Creativity, the performing arts, and composing may be good for developing the poet in a child, but poetry has no practical value. People often ask what the point of something which does not produce anything of material and quantitative benefit might be. Alexis de Tocqueville made a similar observation in his *Democracy in America*. He writes that Americans, being a democratic and practical people, “cultivate those arts which help to make life comfortable rather than those which adorn it. They habitually put use before beauty and they want beauty itself to be useful.”<sup>5</sup> He later adds that “so much the same takes place in the case of the fine arts as we have seen happening in the case of the useful arts. Quantity increases; quality goes down. Unable any longer to conceive greatness, they try for elegance and prettiness.”<sup>6</sup>

It may prove useful to compare America to that of another area of the world to further clarify this distinction. The above quote comparing sports to music makes a

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<sup>4</sup> The American Assembly at Columbia University, *The Arts and Public Policy in the United States*. (Englewood Cliffs, NJ: Prentice-Hall Inc., 1984), p. 113.

<sup>5</sup> Tocqueville, Alexis de, *Democracy in America*. (New York: Perennial Classics, 1969), p. 465.

<sup>6</sup> *Ibid*, 468.

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distinction between Europe and America in the two countries' differing opinions of the role of music in society. Musical life in Europe is rooted in the church and concert hall. It plays more of a central role in everyday life and has been so for centuries. The symphony thus has a certain quality of social and intelligent allegiance from its citizens. The classical artist is not seen as some strange outcast, but as a bearer of a sacred tradition. In the US, on the other hand, the symphony is seen perhaps more as an after-work form of "distraction."<sup>7</sup> One can see the difference firsthand by attending a symphony orchestra concert in the US and one in Europe. During an American symphony orchestra performance, one will often witness audience members scuffling out of the concert hall immediately after the conductor has given the downbeat of the last note. European audiences, on the other hand, will often clap in unison for half an hour or sometimes more. Such enthusiasm and respect is hardly, if ever, seen in the States.

Part of the reason for these variations in importance placed on classical music between America and Europe is the differing histories of classical music and the symphony orchestra on the two continents. Because classical music is an "invention" of the Europeans, it of course has a longer history on their continent than in the US. It is important to consider briefly the history of the orchestra in order to understand where it came from and thus gain a better idea of where it could go. The modern symphony orchestra first came into being in the mid-eighteenth century during the "Age of Elegance."<sup>8</sup> Its origins were earlier, however, in the courts of the ruling aristocracy, and first arose out of the social conditions of the Renaissance. The orchestra as an institution

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<sup>7</sup> Lebrecht, Norman, *Who Killed Classical Music? Maestros, Managers, and Corporate Politics* (Secaucus, NJ: Carol Publishing Group, 1997), p. 42.

<sup>8</sup> Unger-Hamilton, Clive and Peter Van der Spek, ed, *The Great Symphonies*. (London: Sidgwick & Jackson, 1988), p. 14.

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has changed and adapted itself to the differing conditions of each century.<sup>9</sup> A more clear-cut step towards the modern symphony could first be witnessed during the Middle Ages when town musicians from the thirteenth century onwards were recruited primarily as watchmen. They used their instruments to give warnings of fire, burglary, and the like. Soon these town musicians were organized into guilds, like those of other medieval craftsmen.<sup>10</sup> Ensembles composed of these guilded musicians soon performed in the major Sunday services and for the private chapels of Kings and other members of the nobility.

It was not until the Monteverdi operas beginning in 1607 that instruments were utilized fully for their diverse and beautiful tone colors. This led to an increase in the status of the symphony orchestra as a means of producing music. At this point in time, operas were the main concert-going events, and orchestral instruments were utilized merely as background music for these operas. However, the intricate string writing composed would soon lead to greater audience and composer interest in the instrumental music itself. In order for composers to write for instrumentalists, however, money was needed. Assembling a large group of instrumentalists was possible only under the patronage of a wealthy nobleman who was prepared to donate substantially to the music which he enjoyed.<sup>11</sup> It is fortuitous that the cultural climate of the time made it a social necessity for opera and orchestra music to be present in the homes of noblemen. This created a network of the largest and most successful musical organizations which could be funded, and began a trend which continues to today—members of the elite financing classical music and the symphony orchestra. Although in present day Europe, the state

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<sup>9</sup> Raynor, Henry, *The Orchestra: A History* (New York: Charles Scribner & Sons, 1978), p. 9.

<sup>10</sup> *Ibid*, p. 13.

<sup>11</sup> *Ibid*, p. 18.

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has taken over this funding function, it was born from this idea. Today the state is now the patron of musical art in Europe, as the royalty once were.

Another element which helped the orchestra evolve to its present day form was the rise of the violin family, which brought the many differing instrumental groups of the Renaissance and the early Baroque period closer to the idea of the symphony orchestra. The violin family, which consists of the violin, the viola, the cello, and the double bass, would allow unique and complex combinations and variations in sound which would be crucial to the symphony orchestra sonority. In fact, the first orchestra was a string orchestra. This would gradually morph into the baroque orchestra, which developed in the mid-seventeenth century. The baroque orchestra was still relatively small but included wind instruments in addition to the string orchestra.<sup>12</sup> The popularity of opera also led to the increasing use of orchestral instruments and the later development of the symphony. Beyond church and court walls, early orchestral music could also be heard in the Collegia Musica, or the amateur musical organizations or clubs.<sup>13</sup>

The modern symphony developed out of the needs of composers. Originally, composers were entirely under the patronage of the emperor, composing music for him for specific occasions. But as the times changed, music began to be written not merely for the entertainment of the King and Queen, but for the sake of the music itself. This, in turn, caused the position of the composer to be elevated to that of an artist, instead of that of a servant. As the demands of the artist changed, the court musician setup would likewise be altered. Composers gradually hoped to write more complicated pieces of music, and felt limited by the performance options available. There was only so much

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<sup>12</sup> *Ibid*, p. 20-26.

<sup>13</sup> *Ibid*, p. 34.

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one could write for a string or baroque ensemble. Thus, the modern symphony developed in response to the composer's need to write instrumental music which would not be too boring or simple. With the diversity of instruments in a symphony orchestra, composers finally had something complex enough to work with, and could thus write more intricate works which suited their artistic needs.<sup>14</sup>

The turning point for the symphony orchestra occurred in the late eighteenth century with the development of the classical orchestra. It was in the German-speaking part of Europe where orchestral music was first written and performed for artistic purposes.<sup>15</sup> These works were no longer mere court entertainment, but works of art.<sup>16</sup> I will address the current relationship between the composer and the orchestra further on in this thesis. The great Austrian composer, Josef Haydn (1732-1809), is known as the "father of the symphony." Although he was not the first to compose symphonies, he was the first to write *great* symphonies of true complexity and artistry. However, the symphony orchestra was still not considered a professional organization during Haydn's time. It was not until 1818 that Vienna first organized regular concerts performed by a professional orchestra.<sup>17</sup>

Because the US lacked the aristocratic political system of the Europeans, it never developed the need for court musicians and symphony orchestras early on. The symphony orchestra only arrived in the US when European immigrants brought it over with them. Also, because America lacked a system of nobility, the tradition of

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<sup>14</sup> Unger-Hamilton, Clive and Peter Van der Spek, ed., *The Great Symphonies* (Sidgwick & Jackson, 1988), p. 14.

<sup>15</sup> Raynor, Henry, *The Orchestra: A History* (New York: Charles Scribner & Sons, 1978), p. 60.

<sup>16</sup> Unger-Hamilton, Clive and Peter Van der Spek, ed. *The Great Symphonies*. (Sidgwick & Jackson, 1988), p. 19.

<sup>17</sup> Raynor, Henry, *The Orchestra: A History* (New York: Charles Scribner & Sons, 1978), p. 97.

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government funding of the orchestra did not develop until recently. Instead, American symphony orchestras had to look to businesses and wealthy individuals for financial support. Most American orchestras had to locate funding through syndicates of wealthy businessmen. This is even true to this day. Lebrecht writes that there existed a "fair exchange" between Europe and America. "Europe gave America the gift of music and America, in return, gave Europe the music business."<sup>18</sup>

In early colonial and federalist America, musicians possessed neither a sufficiently large enough population nor professional talent to support public concerts.<sup>19</sup> Thus it was not until 1842, that The New York Philharmonic, the oldest American orchestra, was founded. It began as an organization of musicians that set up its own management structure and took charge of its own financial affairs until 1908, when management was turned over to a group of wealthy New Yorkers. Although some on this board were musicians, the majority were not; they were simply wealthy patrons, most of them businessmen.<sup>20</sup> This is another difference between American and European orchestra management structures today. Whereas most European orchestras are still run either entirely (Vienna Philharmonic) or partially (Berlin Philharmonic) by the orchestral musicians themselves, this is never the case in America. A non-musician management and board of directors have more power in the matters of the orchestra than the musicians. The US government itself was little involved in the finances and governance of its orchestras until after World War I, at which it encouraged those who were

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<sup>18</sup>Lebrecht, Norman, *Who Killed Classical Music? Maestros, Managers, and Corporate Politics* (Secaucus, NJ: Carol Publishing Group, 1997), p. 58.

<sup>19</sup> Hart, Philip, *Orpheus in the New World: The symphony orchestras as an American cultural institution—its past, present, and future* (New York: W.W. Norton & Company, Inc., 1973), p. 4.

<sup>20</sup> Lebrecht, Norman, *Who Killed Classical Music? Maestros, Managers, and Corporate Politics* (Secaucus, NJ: Carol Publishing Group, 1997), p. 176.

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financially well off to support artistic activities such as the symphony orchestra by ordering financial donations to these organizations tax-exempt.<sup>21</sup>

American orchestras did not just differ from European ones in its management and finances, but also in an artistic sense. According to Philip Hart, "though our [American] orchestras have borrowed important aspects of their function from Europe, their institutional structure, artistic and business direction, and the manner in which they serve and represent the communities in which they perform are uniquely American...no nation enjoys the variety, scope, and impact of the American Symphony Orchestra"<sup>22</sup> Hart states that the American symphony did not attain its unique American style until after the Civil War. American orchestras can almost be viewed as a hybrid organization with an European ancestry and a distinctive American institutional structure and identity. For example, the idea of having a permanent resident orchestra with musicians devoting the majority of their performances to symphonic music under the artistic direction of a single conductor while being supported financially by a board of laymen is a markedly American occurrence which has developed only in the past 100 years.<sup>23</sup>

Another crucial distinction between American orchestras and those elsewhere is a difference in vision. When the American Symphony Orchestra League (ASOL) was founded by the well-to-do Mrs. Leta G. Snow in 1942, its mission for the American orchestra was not the quality of the music, but service to the orchestra's community. The League served as a clearing-house for American orchestras—it was a service organization devoted to the training of conductors and managers, the organization of

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<sup>21</sup> *Ibid*, p. 178.

<sup>22</sup> Hart, Philip, *Orpheus in the New World: The symphony orchestras as an American cultural institution—its past, present, and future* (New York: W.W. Norton & Company, Inc., 1973), p. xv.

<sup>23</sup> *Ibid*, pp. 1-3.

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publications on orchestras, and the hosting of symphony-related workshops. The overall purpose, however, was not merely geared towards the music, but towards the community as well.

Classical music itself is also not as limited in scope as one may think. According to esteemed composer Philip Glass, American classical music is rooted not only in the music of Europe, but that of Africa, Latin America, the Middle East, Asia, and most other parts of the world as well.<sup>24</sup> Although the core of it is still European, it has not denied influences from other areas of the globe. For example, the music of Astor Piazzolla, the Argentinean composer, is well loved and performed in concert halls world over. The influence of jazz, with its African-American roots, has had an enormous influence on classical music ranging from works by Leonard Bernstein to George Gershwin. A host of contemporary composers from Asia such as Tan Dun and Chen Yu have been writing works now being performed by American orchestras. Glass writes: "I think 21<sup>st</sup> century music will be international in character and future American composers will see themselves as Internationalists first and Americans second, which is how it should be."<sup>25</sup> He also adds that classical music is not elitist or stodgy, but is in fact frequently based on both comprehensible folk and religious music.

Many Americans also often have the perception that classical music is an art form which only performs works by dead European composers who lived centuries ago. Although the majority of classical music today does indeed consist of works by dead European composers, this is currently changing and will continue to do so in the future as discussed in the previous paragraph. Classical music should be viewed as a *style* of

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<sup>24</sup> Struble, John Warthen, *The History of American Classical Music* (New York: Facts On File, Inc., 1995), p. ix.

<sup>25</sup> *Ibid*, p. ix.

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music. Kingman, for example, writes that "classical music is a comprehensive manifestation of the art of the composer, and jazz, a stylistically unique manifestation of the art of the improvising performer."<sup>26</sup> Classical music can only survive if new works by modern composers are written today and in the future. The original function of a symphony orchestra was to perform freshly written works and it is important not to lose sight of this fact. The orchestra was a tool of the composer and a close relationship between orchestra and composer was crucial. This should continue today.

It is also important to recognize that there are a very small number of American born conductors currently leading orchestras in the US. Orchestras have a tendency to look for the "exotic" in their hiring practices of maestros. This may perhaps be based on an elitist perception that conductors from abroad have more of a tie to old Europe and classical music, which may in turn contribute to the elitist and snobbish feel that many Americans may receive from the symphony orchestra.

Another clarification to make is the difference between so called "classical music" and "popular music." Popular music is defined as anything that is popular among the public; it reaches a broad audience and is easy to comprehend upon first listening. In the past, classical music was also considered popular music. It was not until this century, that a clear boundary between the two was drawn.<sup>27</sup> Irving Lowens, music critic, bibliographer, and music historian, explains this separation via US history. He writes: "It is my contention that the past history of the US has demonstrated a certain correlation between the dominance of the equalitarian urge and the vitality of popular music, and a similar correlation between the dominance of the libertarian urge and the vitality of fine-

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<sup>26</sup> *Ibid*, p. 242.

<sup>27</sup> *Ibid*, p. 288.

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art music."<sup>28</sup> It was only after this boundary was put in place that the average American believed that classical music was not for them. It was now thought to be only for the finely educated and well-to-do. The average Joe was better off sticking to popular music. This perception is an important one to change if orchestras are to continue to recruit new and engaged audiences.

### 1.2 Renewability of the Symphony Audience: A Discussion of the "Problem"

No art form can survive without an audience. How dire is the symphony audience in America today? Conflicting comments about the symphonic audience situation make the true situation hard to unveil. Ward Gill, Chief Operating Officer of the Minnesota Orchestra states that "they have been saying our audiences are aging for years and years. We do have to be aware, but women in their 50s have been the majority of subscription buyers for a long time. That hasn't changed."<sup>29</sup> Gary Burger, director of the Knight Foundation, contends, however, that "If everything's fine, why are so many orchestras in financial trouble? If attendance is growing and so many young people are going to concerts, why isn't it showing up in the stats?"<sup>30</sup>

Contrasting statements run the gamut from optimists such as Jack McAuliffe of the ASOL to pessimists like Norman Lebrecht, author of *Who Killed Classical Music?* Lebrecht, for example, writes that "there had been crises [in classical music audiences]

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<sup>28</sup> *Ibid*, p. 287.

<sup>29</sup> Tillotson, Kristin, "Orchestras Seek New Faces to Supplement Aging Concertgoers," (*Star Tribune*, January 9, 2002).

<sup>30</sup> *Ibid*.

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before, but none so severe or intractable."<sup>31</sup> He sees American society shifting its attention and resources away from the arts and especially classical music and towards new social needs such as AIDS research, care of the elderly, and environmental woes. However, he fails to address the fact that social problems have always existed in the US, many of them more severe than those of pollution and social security. Lebrecht also asserts that younger Americans are deterred from attending the symphony by high prices, presentation, and ambience. In addition, he places blame on the music business, managers of orchestras, and highly paid "star" soloists and maestros who because of their high fees, produce a sometimes unbearably high financial strain on orchestras.<sup>32</sup> Lebrecht's views will be further discussed in the second chapter of this thesis. McAuliffe, on the other hand, states that orchestra audiences are more robust than ever before.

From my research and close analysis of data from the NEA and Knight Foundation study datasets, and data from individual orchestras, I conclude, however, that the truth lies somewhere between these two extremes. Yes, audiences at symphony concerts have an older than average demographic. However, this number has not been rising over the years, but has remained about the same. Thus, audiences have been renewing themselves so far. The important question is why younger audiences do not attend as frequently. In short, orchestra audiences are in no immediate danger of dying out. However, there are many changes which can be instituted by orchestra marketing directors to attract a younger and more knowledgeable audience. The problem and solution lie in both the marketing culture of symphony orchestras and the lifestyle of audience members. I will first briefly discuss the role of marketing in audience

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<sup>31</sup> Lebrecht, Norman, *Who Killed Classical Music? Maestros, Managers, and Corporate Politics* (Secaucus, NJ: Carol Publishing Group, 1997), p. 18.

<sup>32</sup> *Ibid.*

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recruitment, followed by a discussion of audience lifestyle. The two are actually quite interconnected.

The subscription marketing culture is an important determinant of audience attendance. The majority of American symphony orchestra concerts are sold to subscribers, leaving only a small number of tickets available for single ticket buyers. As a result, marketing strategies are geared towards subscribers. Most of these subscribers are older and wealthier than single ticket buyers. Many are also retired and thus have more free time than younger people. Younger people who do attend symphony concerts attend less frequently, and tend to purchase single tickets instead of an entire season's subscription. As a result, by emphasizing a subscription culture over single tickets, marketing directors may be warding off younger potential orchestra attendees. However, by switching away from a subscription framework, marketing directors are likewise afraid of losing their base audience and the majority of their ticket revenues. This is the main dilemma facing orchestras—should they change their marketing strategy, thereby attracting a younger audience, or keep it as it is, thus retaining the more mature and wealthier audience? Is it possible to strike a balance between the two? It is also important to note that the subscription culture is so entrenched in the symphony structure that it would be quite difficult and expensive to overhaul.

Due to the development of new technologies and the increase in the number of competing leisure activities for peoples' times, symphony orchestras also need to be more flexible with their ticket selling strategies. Slightly more people are attending concerts than in the past, as I will show in Chapter 3, but they are attending less frequently, and are less loyal to the symphony orchestra as an institution.

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A RAND study also predicts a major restructuring of the American performing arts system. Instead of the sharp distinctions between the commercial, nonprofit, and volunteer segments of the performing arts, the authors envision divisions along the lines of big organizations versus small organizations. In other words, the big organizations would cater to broad markets while the smaller ones would absorb the niche markets. They predict that mid-sized organizations, however, will struggle to survive.<sup>33</sup> This, of course, can be applied to orchestras as well if RAND is indeed correct, and might suggest diverse marketing techniques for different sized orchestras.

The RAND study also recommends that orchestras focus on a marketing strategy which heeds more attention to the demand of the audience rather than the supply. In other words, instead of concentrating on aspects such as how to increase the quality of the performance experience, which guest conductors to hire, how friendly the ushers are, and so on, orchestras should instead attempt to learn more about the audience. They must figure out who exactly is attending their concerts and why they do so. They must also locate the people who are not attending and examine reasons why. This is simply a different approach to the audience renewability problem, and interestingly enough would, according to the authors of the study, ultimately help with the supply problem as well.<sup>34</sup> However, it is important to keep in mind that there may be a danger of paring everything down to the lowest common denominator by ignoring the supply approach entirely. As mentioned above, however, according to the study, by improving the demand, supply will be indirectly improved as well.

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<sup>33</sup> "The Performing Arts: Trends and Their Implications." *RAND*. Online. 18 Dec. 2002.

<sup>34</sup> McCarthy, Kevin, Arthur Brooks, Julia Lowell, and Laura Zakaras, *The Performing Arts in a New Era* (RAND Corporation: RAND Publications, 2001), p. 112.

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Another marketing issue is that of image. In modern-day America, everything has a brand, even the arts. This does not necessarily have to be viewed as something negative or unwarranted. Orchestras are selling symphonic music and they need to do a better job of imprinting a more positive image of the art form in Americans' heads. A different approach to brand imaging can help rid classical music of its stodgy and elitist image. Flamboyant and eccentric maestros such as Seiji Ozawa, for example, can produce positive brand imaging effects. In addition to attracting younger people, a more upbeat brand image may also interest potential audience members to learn more about the art form and attend concerts. At the same time, marketing directors must be careful not to alienate traditional audiences.

It is also important to distinguish between symphony concerts and other performing arts and leisure activities to allow the symphony to stand out from other activities which might be competing for peoples' time. For example, it should be stressed that classical music concerts are different from "entertainments" such as sporting events or surfing the internet. According to Jack McAuliffe of the ASOL, audiences differentiate between "entertainments" like the movies or sporting events and "enrichments" like symphony concerts and ballets.<sup>35</sup> This differentiation should be emphasized in marketing circles, again to allow the symphony to stand out from its "competition." Although this may not help attract those who are seeking "entertainments" and not "enrichments," at least it will help separate the two pools so that those who are specifically seeking "enrichments" in their leisure activities can be better targeted for attending symphony concerts.

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<sup>35</sup> McAuliffe, Jack. Personal interview. 18 June 2002

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The other aspect of the audience "problem" is the lifestyle of concert-goers. The marketing directors with whom I met stated that they did not necessarily believe that audiences were "graying," but rather that there was a life cycle to the audience member. These comments are all based on their personal observations and the small amounts of data which their orchestras may have collected. The theory states that younger adults will attend (although not necessarily subscribe) in their single years and then drop out in their 30s due to time and money constraints from simultaneously juggling family and career responsibilities. However, this is based on the presumption that people do attend less at this age because of these time and money constraints and not some other reasons.

The hypothesis goes on to assert that as children move out and career obligations become more stable, people begin to drift back into attending symphony concerts in their late 40s and early 50s. This is the age group which is most represented in concert attendance demographics.<sup>36</sup> If this life cycle explanation is indeed true (it is difficult to say for sure due to the lack of data from the past), then it may be safe to state that the paucity of audience members in their 30s may be partly due to external constraints and not necessarily a lack of interest in the orchestra. It can also be surmised that the older average age of orchestra attendance may be high because of the drop out of younger people in their 30s. Lower attendance among younger people would not necessarily correlate with a lower interest in attendance or evidence that the audience is "graying" but have more to do with inhibitions preventing attendance.

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<sup>36</sup> *Ibid*, Brussel, Catherine. Personal interview. 05 December 2002; Cambron, Edward. Personal interview. 15 November 2002; Cooke, Camille. Phone interview. 04 December 2002; Drohan, Kathleen. Personal interview. 06 December 2002; Wade, Charlie. Telephone interview. 26 November 2002; Wiprud, Theodore. Personal interview. 06 December 2002.

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This chapter has served as an introduction to the origins of the symphony orchestra in Europe and its unique developments and characteristics in the United States. A discussion of the key "problem" of this thesis has also been introduced. In the following chapter, I will review the key literature written on the topic of audiences and the symphony orchestra, and the future of the symphony in general. This, followed by analysis of case study orchestras in Chapter 3 will cover the above topics and concerns in greater depth.

## CHAPTER 2

### A Mélange of Commentaries

“Although confronted with these problems [of audience development] everyday, I don’t think that they belong to our period alone...Many things have improved like rehearsal conditions. The recording industry has also set a new, higher standard. While listening to a mediocre performance, the recording made by a very good orchestra is in your ear. Mediocre performances are still possible, but now you know that they are mediocre.”

-Pierre Boulez, Maestro<sup>1</sup>

“Everything is professional, everything is marketable, but very little is worth hearing...For all the polish of today’s orchestral players, there is hardly an orchestra that sounds as forcefully musical as they do on recordings made more than two decades ago.”

-Edward Rothstein, Author of “The New Amateur Player and Listener.”<sup>2</sup>

#### 2.1 Major Research Pieces on Symphony Audiences

**I**n this section, I will briefly analyze ten important commentaries on symphony audiences. Together, they portray a diverse group of opinions on symphony audience development. This will be followed by a discussion on themes which arose from the reviewed literature.

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<sup>1</sup> Wheatland Foundation, *The Evolution of the Symphony Orchestra: History, Problems, and Agenda*. (London, 1986), pp. 7-8.

<sup>2</sup> Rothstein, Edward, “The New Amateur Player and Listener,” Peyser, Joan, ed., *The Orchestra: Origins and Transformations* (New York: Charles Scribner’s Sons, 1986), p. 534.

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### *Orpheus in the New World: The Symphony Orchestra as an American Cultural Institution* by Philip Hart (1973)

Hart laments the paucity of information on symphonic audiences, as well as on those who fail to attend. He writes that “symphony orchestras have been extraordinarily remiss in not placing emphasis on a systematic and statistically authoritative study of audience potential in this country.” Despite the fact that this was written thirty years ago and that studies on orchestral audiences have improved, it is still true today that much more can be done on audience data collection. Hart divides the orchestra audience into several key groups—the serious music student, the businessman, the music lover attracted by music he or she enjoyed on classical recordings, the fan attracted by a star soloist or charismatic conductor, and those who come for social reasons.<sup>3</sup> The core audiences are the subscribers who tend to be older and wealthier than single ticket buyers and the population at large. He states that many young couples may find it difficult to attend due to the urban locations of concerts, the necessity of planning to attend weeks in advance (due to subscriptions and the speed with which single tickets are sold out), finding babysitters, and so forth.<sup>4</sup>

Another interesting point Hart makes is that of the frequency with which music is dispensed as background music due to the rise in electronic media. With this constant flow of music, he is afraid of bad music driving out the good. He writes that “to the degree that ‘wall-to-wall music’ becomes a substitute for serious and attentive listening,

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<sup>3</sup> Hart, Philip, *Orpheus in the New World: The symphony orchestras as an American cultural institution—its past, present, and future* (New York: W.W. Norton & Company, Inc., 1973), p. 390.

<sup>4</sup> *Ibid.*, p. 390.

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it degrades the art as a valid musical experience and damages the cause of music in general and symphony orchestras in part.”<sup>5</sup>

### ***The Evolution of the Symphony Orchestra: History, Problems, and Agenda, A Conference sponsored by the Wheatland Foundation chaired by Isaac Stern (1986)***

This conference raised many important issues concerning what may be going wrong with orchestras today. The conductor Pierre Boulez writes that “one reason for the general discontent with orchestra life is the lack of flexibility.”<sup>6</sup> This lack of flexibility is not only visible artistically, but also in presentation. Boulez later writes: “It would be wise to create a place where people can come at six after leaving offices. Somewhere people can not only eat, but also obtain documentation, hear lectures, see films.”<sup>7</sup> He views the repertoire performed by orchestras as narrowing and the orchestra as slowly becoming a museum for older works. He calls for the performance of more contemporary works and closer collaboration with composers.

The orchestra manager Ernest Fleischmann also perceives the growth in the quantity of audiences as not necessarily a sign of a growth in the *quality* of audiences. For example, he states that the increased audience is simply a “growth in people who expect entertainment.”<sup>8</sup> In his opinion, education of audiences is the most important task of orchestras.

TV director Humphrey Burton emphasizes the importance of a more technological approach to symphony concerts, especially in the attraction of a younger

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<sup>5</sup> *Ibid.*, p. 398.

<sup>6</sup> Wheatland Foundation, *The Evolution of the Symphony Orchestra: History, Problems, And Agenda.* (London, 1986), p. 9.

<sup>7</sup> *Ibid.*

<sup>8</sup> *Ibid.*, p. 11.

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audience. He writes: “If we are going to attract the attention of the younger world, we’ve got to go the way the world is moving, a technological way.”<sup>9</sup> He advocates snazzy novelties such as wide screens projecting close-ups of members of the orchestra in front of each orchestra seat along with the provision of an electronically turned score.<sup>10</sup> This is somewhat similar to the MetTitles™ used by the Metropolitan Opera. However, because there are no words in symphony concerts, this constant imaging of the faces of musicians may not be so interesting, but more of an annoyance. Large screens projecting images of the musicians are sometimes used in summer festivals such as the Tanglewood Festival in Lenox, Massachusetts. Many audience members have actually found them to be distracting, rather than helpful. The idea of an electronically turned score would only be helpful to an extremely small portion of the audience—most people in fact can not even read music, let alone make sense of an orchestral score. This too would become more of an irritating distraction. Burton also proposes closer collaboration between symphony managers and radio and TV. This would be a better idea as it would increase media attention for the symphony.

***The Future of the Arts: Public Policy and Arts Research* Edited by David P. Pankratz  
and Valerie B. Morris (1990)**

In this collection of essays on the topic of the arts and public policy, several interesting ideas are proposed which are relevant to the study of orchestras and audiences. In Terri Lynn Cornwell’s article “Democracy and the Arts: The Role of Participation,” she writes about the differentiation between “active” and “passive” arts participation. The

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<sup>9</sup> *Ibid.*, p. 109.

<sup>10</sup> *Ibid.*, p. 109.

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active participants are the performers themselves. The passive segment is divided up into three elements—the audience, the volunteer, and the patron. She views the volunteer and the patron as key elements of this passive participation. Cornwell also writes that participation in the arts is similar to political participation and thus can be similarly analyzed.<sup>11</sup>

David Pankratz writes in a separate article on arts policy and aging that “overall, however, age is not a major determinant of attendance at performing arts events and museums.”<sup>12</sup> Instead, he cites education and income levels as better predictors. Instead of stating that symphony orchestras are failing to attract younger audiences, he instead asserts that many of the institutional practices of some arts organizations may actually deter older adults from attending.

Richard Peterson argues that the baby boomer generation will be less interested in taking up classical music and attending symphony concerts than their parents’ generation. The reason for this is cultural, he says. Children used to grow up with classical music played in their homes, but this has been replaced by rock-and-roll in the baby boom generation. People today also tend to listen to many different types of music, rather than devote a lot of time to just one genre. Thus, classical music will have to share its time with other musical forms. Peterson also cites shorter attention spans as another reason for a decline in baby boom attendance. Symphony concerts require more and longer focus than a thirty-minute sitcom.

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<sup>11</sup> Cornwell, Terri Lynn, “Democracy and the Arts: The Role of Participation.” Pankratz, David B. and Valerie B. Morris, eds., *The Future of the Arts: Public Policy and Arts Research*. (New York: Praeger Publishers, 1990), p. 68, 76.

<sup>12</sup> Pankratz, David B, “Arts Policy in an Aging Society,” Pankratz, David B. and Valerie B. Morris, eds., *The Future of the Arts: Public Policy and Arts Research* (New York: Praeger Publishers, 1990), pp. 172-173.

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He also states that classical music is nothing more than “ambient sound” to many people. In other words, it is background music, something to sooth rattled nerves while doing something else. The music is not being listened to for the sake of being listened to. However, it is important to note that this “ambient sound” can only be a new phenomenon as it was not possible before the invention of the radio in the early 1900s and 33 rpm records in the 1950s. Finally, Peterson predicts that classical music will eventually be replaced by world music. It is possible that it might not necessarily displace classical music, but merely enrich it with a “new music aesthetic.”<sup>13</sup>

### NEA Reports (1991, 2000)

In this section, I will address two similar NEA studies. The first that will be discussed is Report #24 entitled “Expanding the Audience for the Performing Arts” by Alan Andreasen. He writes that attendance at opera and symphony concerts have been growing at a steady pace since 1970. Due to the gradually rising socioeconomic status of the general population, attendance at performing arts performances has likewise benefited since arts participation is correlated with socioeconomic markers such as high income, education, and prestigious occupations.<sup>14</sup>

He also attributes part of this growth in attendance to successfully planned direct and indirect interventions by arts organizations. Some examples of direct intervention include audience-building marketing techniques such as creative advertising and subscription brochures and more accessible ticket booths. Indirect interventions include

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<sup>13</sup> Peterson, Richard A, “Audience and Industry Origins of the Crisis in Classical Music Programming: Toward World Music,” Pankratz, David B. and Valerie B. Morris, eds., *The Future of the Arts: Public Policy and Arts Research* (New York: Praeger Publishers, 1990).

<sup>14</sup> Andreasen, Alan R, *Expanding the Audience for the Performing Arts*, National Endowment of the Arts Research Division Report #24 (Santa Ana, California : Seven Locks Press, 1991), p. 1.

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more media attention on television and the availability of recordings by performers at concerts.<sup>15</sup> Andreason also states that the problem of expanding audiences is essentially a marketing problem with five main elements—product, price, promotion, place of offering, and public relations. Marketing directors must understand the process by which the public comes to attend performances. The problem is that there is not a clear idea of what this may be, according to Andreason. He also attributes future arts attendance potential on early exposure to the arts. College exposure to the arts is also quite influential in his opinion.<sup>16</sup>

This study also addresses the importance of the audience member's position in the family life cycle in predicting their symphony attendance. Interestingly enough, he found that the age group which had the least interest in attending the arts was the oldest one. He also states that a person's place in the family life cycle incorporating age with marital status and children is a better predictor of attendance than the actual age of the person. His research shows "arts participation as curvilinear with respect to the family life cycle."<sup>17</sup> Andreason also noted that there was greater interest in the more "serious" art forms such as symphony concerts and opera than in more "frivolous" arts. Also, entertainments such as TV viewing, sports, and other media did not appear to inhibit attendance at live arts events in any way.<sup>18</sup>

In NEA Report #42 entitled "Age and Arts Participation," the authors state that "the classical music audience is aging faster than the population as a whole. In 1982 those under 30 years of age comprised 26.9% of the audience and by 1997, they comprised just

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<sup>15</sup> *Ibid.*

<sup>16</sup> *Ibid.*, pp. 10-11.

<sup>17</sup> *Ibid.*, p. 50.

<sup>18</sup> *Ibid.*, p. 32.

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13.2%. Over this same span of years, those over 60 years of age rose from 15.6% to 30.3% of the classical music audience. By 1997, a higher proportion of the classical music audience was over 60 than was the audience for any other performing art form.”<sup>19</sup> These statistics should be taken with a grain of salt, however. Statistical methodologies in collecting data from 1982 and from 1997 were quite different from one another and thus it is not entirely reliable to compare statistics from the two years. In addition, frequency of attendance, proportion of people over 60 in the general population (more due to the baby boom), were perhaps also not taken into account. These could all skew the data. I will discuss this in further detail in chapter 4.

This NEA study also shows much evidence for the life cycle theory. The authors report that “looking at all the art forms together, we find that art attendees in their 20s get quite involved in the art forms of their choice and attend often, while attendees in their 30s and 40s do not go as often, perhaps because of the competing demands of family and work. Finally in their later years, attendees come back.”<sup>20</sup> Thus, they also report that it is not necessarily age that is the factor in attendance, but the stage of the life cycle in which one is in. However, they do report that age is still an important factor in the older two age groups. In other words, the generation predating the baby boomers is more likely to attend than the slightly younger baby boomers.<sup>21</sup>

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<sup>19</sup> Richard A. Peterson, Pamela C. Hull, and Roger M. Kern, *Age and Arts Participation: 1982-1997*, National Endowment of the Arts Research Division Report #41 (Santa Ana, California: Seven Locks Press, 2000), p. 2.

<sup>20</sup> *Ibid.*

<sup>21</sup> *Ibid.*, p. 61.

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### *Who Killed Classical Music? Maestros, Managers, and Corporate Politics* by Norman Lebrecht (1997)

This book holds perhaps the most pessimistic view on the future of classical music. Lebrecht views the symphony orchestra as an institution destroyed by business managers, the music business, and star maestros and soloists who ask for what he calls exorbitant fees. He cites several reasons why audiences have dried up, a point he takes as a given.

His first complaint targets star soloists and famous guest conductors. He writes, for example, that “every opera, concert, and major recording loses pots of money, largely because the artists who get top billing are grotesquely overpaid and their agents are in on the take.”<sup>22</sup> He blames the press for overexposure of these stars, which takes away some of their mystique. He calls this a “problem of presenter decline.”<sup>23</sup> However, he fails to take into account the fact that with the recent spread of technology, this is the way that things have gone for everyone from politicians to movie stars, not just musicians. It is just a consequence of the digital age that information about certain prominent people can be made public and passed around with relatively low cost. Second, he argues that orchestras are forced to pay too much money in order to hire famous soloists and guest conductors. He writes that if star fees were halved, other costs would fall. Tickets could then be made cheaper, and audiences would attend in larger numbers.<sup>24</sup>

Lebrecht also argues that the rise in the number of concerts has led to audience tedium and concerts of poor quality. As a result, audiences lose interest and stop

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<sup>22</sup> Lebrecht, Norman, *Who Killed Classical Music? Maestros, Managers, and Corporate Politics* (Secaucus, NJ: Carol Publishing Group, 1997), p. 9.

<sup>23</sup> *Ibid*, p. 5.

<sup>24</sup> *Ibid*, p. 6.

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attending.<sup>25</sup> Although this is true to a certain extent—orchestras must be careful not to produce a surplus of concerts—playing too many concerts does not necessarily mean that people will automatically attend more concerts. They may simply not attend at all. In other words, it is not the quality of the concert or boredom with attending the surplus of concerts which might be keeping audience away. The supply of concerts and the demand of the audience must simply be kept in balance.

His third argument is that of an “unhealthy” relationship between the private and public sectors. Artist managements make a large portion of their money from public-funded institutions—in other words, orchestras rely heavily on state and corporate donations. Lebrecht views this as problematic because in this framework, programming is directed not by the musicians, but by what is politically correct and business approved. This is because managers need to “make money and obey politicians and sponsors.”<sup>26</sup> He also writes that when classical music began to “court state and corporate patronage, it took on an elitist aura that stunted the audience base.”<sup>27</sup> However, classical music in the US has always been supported by corporate patronage. The arts have never been able to survive on their own. Outside help, whether in the US or in Europe, has always been a requirement for the symphony orchestra’s survival.

Lebrecht also writes about reasons why younger audiences are deterred by symphonies. He names three main elements: price, presentation, and ambience. Price may be an inhibitor; however, one should remember that people often pay similar prices to attend a rock concert or baseball game. Ambience and Presentation are, to a certain extent, greater deterrents. Lebrecht states that because the main seats in an orchestra hall

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<sup>25</sup> *Ibid*, p. 5.

<sup>26</sup> *Ibid*, p. 226.

<sup>27</sup> *Ibid*, p. 401.

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are filled with corporate sponsors, the atmosphere is thickened, thus turning away younger audiences.<sup>28</sup> I will further address the theme of ambience, presentation, and audiences in the second part of this chapter.

In sum, although Lebrecht's arguments are a bit overly pessimistic, his bold language was perhaps simply a means of alerting orchestras to problems which they face. Unfortunately, he does not suggest any feasible ideas for how the audience situation can be solved or improved.

### **“Orchestras in a Complex World” published in *Harmony* by Bernhard H. Kerres (1999)**

Kerres cites five major factors for successful orchestras, which he defines largely by audience attraction. The first factor is high-quality orchestral performances brought about by excellent orchestral musicians, guest artists, and conductors. The second is “challenging and interesting programming.” The third factor is the quality of the management and staff, along with energetic volunteers and sponsors. Maintaining a positive media profile and successfully reaching out to and educating the wider community are the fourth and fifth factors.<sup>29</sup>

The most interesting point which Kerles brings up is that of giving an orchestra a “brand.” A brand's success relies on the success with which it can project an image in people's minds. This is especially important in today's fast-paced, “CNN Effect” world where people are constantly inundated with new information. Focus on one item is made more difficult and ideas and products often need to have a brand in order for them to

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<sup>28</sup> *Ibid*, p. 191.

<sup>29</sup> Kerres, Bernhard H, “Orchestras in a Complex World,” *Harmony* 8 (1999): 47.

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make a lasting impression on peoples' minds. Kerles writes that "in today's world, a brand for an orchestra is just as important as for any other good."<sup>30</sup> For example names such as Berlin Philharmonic or New York Philharmonic are associated with words such as "classy" and "high-quality." According to Kerles, these names have indeed become brand names even though the orchestras have not necessarily made efforts to promote them as such. Smaller orchestras should thus develop a brand which fits a niche not covered by "world-class" orchestras such as those above-named. Kerles recommends that orchestras think deeply about what sort of image they would like to impress on the minds of the public when its name is heard.<sup>31</sup>

The media play a large role in this brand imaging. The more frequently an orchestra is mentioned in newspapers and magazines, the higher the brand recognition. Sometimes media portrayals are more important than the actual success of performances in influencing people to attend concerts. Kerles also writes that there is a reinforcing circle which develops as a result of brand recognition. The stronger the brand recognition, the higher the attraction to potential audiences, and the more the word of a successful performance will spread. High-level artistry, fundraising success, recording, touring, and the use of the Internet are also important elements which add to this feedback loop. Being well versed in new media is also advantageous in today's competitive market. Outreach and education of the community also have the added advantage of increasing visibility and brand recognition. In short, Kerles views a focus on

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<sup>30</sup> *Ibid*

<sup>31</sup> *Ibid.*, p. 51.

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brand recognition as the key to all other elements of audience development.<sup>32</sup> One way of attracting a younger audience would thus be gearing the brand towards them.

In addition, according to a National Arts Journalism Program study on news coverage of the arts in America, “the arts beat is bigger and more heterogeneous than we anticipated. Newspapers like to mix the high arts with mass culture and lifestyle coverage.”<sup>33</sup> This suggests that classical music may be competing with more subjects in the newspapers for attention than previously thought and should take extra care to stand out in brand recognition. One other interesting finding of this report is that “local museums and major civic not-for-profit institutions that have mastered the technique of the blockbuster presentation win prominent coverage, even in competition with the entertainment industry’s publicity machine.”<sup>34</sup> This goes to show that non-profits such as the orchestra do in fact have a chance at successful competition for media attention.

***The Performing Arts in a New Era* by Kevin McCarthy, Arthur Brooks, Julia Lowell,  
and Laura Zakaras (2001)**

The authors of this work hypothesize a fundamental shift in the entire structure of the live performing arts in the near future. They predict that the number of organizations presenting live performing arts performances at the professional level will contract, while expanding at the community level. Their research also concludes that performing arts organizations will become increasingly concentrated in large metropolitan areas, producing problems with audience attendance in smaller and midsized cities across the

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<sup>32</sup> *Ibid.*, p. 57.

<sup>33</sup> Michael Janeway, Daniel S. Levy, Andras Szanto, and Andrew Tyndall, *Reporting the Arts: News Coverage of Arts and Culture in America* (New York: Columbia University National Arts Journalism Program, 1999), p. 9.

<sup>34</sup> *Ibid.*

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country. However, at the same time, the study predicts an increase in access to smaller, low-budget performances performed by amateur groups.<sup>35</sup>

An important idea the authors bring up is that of the structure of audience demand. They write that among all the different factors which will shape the future of the performing arts, none will be as crucial as that of the structure of demand. In fact, they state that all elements of the supply of the arts will also depend on the stimulation of greater demand for the arts.<sup>36</sup> American arts organizations have long viewed arts policy in terms of how it impacts arts organizations and artists, instead of audiences. It would be worthy to switch attention from supply to demand. They write that education is by far the most crucial factor in determining participation in the performing arts. While gender and age are somewhat important, education is much more crucial. They also assert that arts education specifically and early exposure to the arts are especially strong predictors of future attendance.<sup>37</sup>

The study also states that although the audience for classical music may have increased in percentage, it is not entirely clear how much of this growth is a result of changes in survey methodology, and how much is due to an actual change in behavior. The frequency with which people attend concerts is yet another issue. This is difficult to surmise from existing data. For example, the authors state that the frequency data from the 1997 SPPA study undertaken by the NEA are not even directly comparable to earlier data due to differences in collection.<sup>38</sup> The authors of this study also found a rise in the need for greater flexibility in concert attendance due to changing characteristics of leisure

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<sup>35</sup> McCarthy, Kevin, Arthur Brooks, Julia Lowell, and Laura Zakaras, *The Performing Arts in a New Era* (RAND Corporation: RAND Publications, 2001), p. 16..

<sup>36</sup> *Ibid*, p. 112.

<sup>37</sup> *Ibid*, pp. 22-23.

<sup>38</sup> *Ibid*, p. 29.

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life. The study also states that rising incomes may instigate people to spend their leisure time with media activities rather than live events.<sup>39</sup> Working longer and more stressful hours may predispose people to spend any free time they may have in the comfort of their homes.

The authors also assert that age may affect participation patterns in two main ways. First, participation patterns change as people age. Second, they predict that the rate of arts attendance may decrease with the baby boomer generation. In addition, today's youth are much more comfortable with media activities and technology than even their baby boomer parents. This could all be detrimental to arts attendance in the future. The authors write that "today's youth are more comfortable with technology and will base their prime arts-consumption years on those."<sup>40</sup>

### **Meeting with Jack McAuliffe, Vice President and Chief Operating Officer, ASOL (2002)**

According to McAuliffe, audiences have grown substantially and are also broadening in respect to the ages of audience members. However, the data of the ASOL must be taken with a grain of salt. The organization is one which would like to perceive the orchestra situation as a rosy one since it is the clearing house for the majority of America's orchestras and its survival depends on the health of its member orchestras. I will address ASOL data more comprehensively in Chapter Four. Audiences have not, as the ASOL reports, grown substantially if population growth is taken into account. However, there is evidence that the audience is in fact broadening—more "different"

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<sup>39</sup> *Ibid*, p. 34.

<sup>40</sup> *Ibid*.

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people are attending orchestra concerts. McAuliffe also states that the life cycle of the audience member is an important element of attendance statistics.<sup>41</sup>

### ***Classical Music Consumer Segmentation Study: How Americans Relate to Classical Music and Their Local Orchestras, A Study Commissioned by 15 American Orchestras and the John S. and James L. Knight Foundation (2002)***

This study, just released a couple of months ago, is perhaps the most comprehensive and well researched audience study on orchestras and audiences thus far. The study, entitled, *Magic of Music*, first received funding in 1994 from the Knight Foundation to study the future of classical music and classical music audiences through the case study of 15 orchestras. The study based its data on more than 11,300 random sample telephone interviews, a national telephone survey of 2,200 adults, and a 1,500 orchestra ticket buyer survey. Over 10,000 responses were counted. The entire study took two years.<sup>42</sup>

One of the main findings of the study is that about “10% to 15% of Americans have a close or moderately close relationship with classical music.” However, only about half of those that expressed the most interest actually acted upon this interest and attended concerts. They thus conclude that there is indeed an American audience out there for classical music, but that it is simply not being located by orchestras.<sup>43</sup> Radio is cited as the key mode of classical music consumption, followed by recordings, and live concerts. Thus, the study is not entirely based on audiences in terms of those people who

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<sup>41</sup> McAuliffe, Jack. Personal interview. 18 June 2002.

<sup>42</sup> John S. and James L. Knight Foundation, *Classical Music Consumer Segmentation Study: How Americans Relate to Classical Music and Their Local Orchestras* (Southport, CT: Audience Insight LLC, 2002), p. 5.

<sup>43</sup> *Ibid*, p. 7.

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attend a live concert. This is a key flaw with the reported results. For example, the authors state that people have a close relationship with classical music through the media. However, the quality of listening is not fully taken into account. Ed Cambron, Marketing Director at the Philadelphia Orchestra, stated for example, that what the study cites as “listeners of classical music” are sometimes simply people who treat the art form as “wallpaper.” It may be true that they may listen to it while they are cleaning the house or doing taxes. But for some, it may be because it is soothing to the nerves, not because they are truly listening to it.<sup>44</sup> The study even states that “in all settings, people use classical music to calm themselves, like a balm” and that 78% of potential classical consumers are “casual listeners.”<sup>45</sup> These are the people who most likely view classical music as background sound. Thus when the study reports that 27% of all adults in these 15 communities are potential audiences, the figure may actually be lower.

The study also addresses the subscription marketing culture. The authors report that “subscription marketing acts as a filter on an orchestra’s constituency that runs counter to the goal of attracting younger audiences.”<sup>46</sup> They also state that the majority of audience prospects are simply not interested in “making subscription commitments.”<sup>47</sup> The following statement effectively sums up the dilemma facing orchestra marketing directors: “Until orchestras begin to change their dependence on subscriptions, subscription marketing will continue to be the sweet honey that sustains orchestras and a slow-acting poison that impedes their long-term stability.”<sup>48</sup> Younger people tend to be single ticket buyers and older people tend to be subscribers. Another interesting finding is

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<sup>44</sup> *Ibid*, p. 8.

<sup>45</sup> *Ibid*, p. 51.

<sup>46</sup> *Ibid*, p. 12

<sup>47</sup> *Ibid*.

<sup>48</sup> *Ibid*, p. 13.

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that single ticket buyers have more of an interest in contemporary music.<sup>49</sup> This may in turn suggest that younger people have more interest in new music. This is good news since it is new music which will prevent the symphony orchestra from becoming reduced to a museum performing only older works.

Another issue raised considering attendance is that of drive time from the homes of concertgoers to concert halls. There is a relationship between drive time and rate of attendance; urban residents might attend more frequently than someone who has to drive two hours through traffic into the city to attend. Each of the 15 orchestras included in the study drew about 80% of its ticket buyers from within a 25-mile radius around the concert hall.<sup>50</sup>

One interesting point the study makes is the social nature of concert attendance. For example, data show that half of the individuals sitting in the seats at any performance did not purchase or acquire their own tickets.<sup>51</sup> Eight to ten ticket buyers also report having family members or close friends who also attend concerts.<sup>52</sup> The report also states that “the absence of social context is a major barrier to attendance.”<sup>53</sup> However, despite such data, in the survey, 88% responded that they viewed classical music concerts as primarily a personal experience. Younger audience members were more likely to state that they viewed the concerts as more of a communal experience.<sup>54</sup>

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<sup>49</sup> *Ibid*, p. 95.

<sup>50</sup> *Ibid*.

<sup>51</sup> *Ibid*, p. 31.

<sup>52</sup> *Ibid*, p. 10.

<sup>53</sup> *Ibid*, p. 11.

<sup>54</sup> *Ibid*, p. 85.

**Minnesota Radio Broadcast: Interview with Alan Brown, Director of the Magic of Music Knight Foundation Study (2002)**

In an interview on MRB, Alan Brown reported some of his findings in the above mentioned study on orchestras. Again, he asserted that the state of classical music is “alive and well” and that “orchestras are adrift in a sea of classical music lovers who haven’t been reached yet.”<sup>55</sup> He also states that most people are not interested in subscribing, and this may be keeping them from attending concerts. An interesting finding he also points out is that the age of people who reported interest in classical music was a little younger than the actual orchestra audience itself, which tends to be older and wealthier.<sup>56</sup>

People often also report that they first become interested in classical music through different forms of music. He cites evidence of classical music in pop culture everywhere from cell phone rings to TV commercials as evidence of Americans’ interest in classical music. However, as discussed previously, he is not making the distinction between true listening and understanding of the music as an art form, and “sound wallpaper.” A cell phone beep is not really of musical significance; it’s merely a catchy tune to alert someone that their phone is ringing. Brown also reports a diversification in musical interest among adults. It is becoming more frequent that someone will listen to both rock and opera. He also reported that people who do not know as much about classical music do seek to learn more about it. Head phones at art museums and MetTitles™ at the opera have made those experiences less intellectually frightening. Brown suggests that perhaps symphony orchestras can do something along those lines as

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<sup>55</sup> Brown, Alan. Interview with Kate Smith. *Midmorning*, Minnesota Public Radio. 13, Aug. 2002.

<sup>56</sup> *Ibid.*

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well. Marketing directors should also recognize that there is a wide range of audience members in terms of knowledge about the music. It may be wise to have different “types” of concerts, some for “beginners,” and some for the “advanced,” and so forth.<sup>57</sup> The “intimidation factor” may be a significant cause of the inhibition in concert attendance for many. New concertgoers are not sure how to act, when to clap, and what the music is about. But many of these people are indeed interested in learning more.

### 2.2. Themes in Reviewed Literature

In the above reports and books, several themes have arisen—education and quality of the audience, the role of the composer and new music and programming, ambience, the role of the music director, and star soloists. I will address these topics briefly basing my ideas on research done by the above-mentioned authors.

#### Education/Quality of the Orchestra Audience

According to the RAND study, education greatly exceeds all other factors in predicting whether or not someone will attend a performance in the arts. They cite reasonable explanations for this phenomenon. Education helps individuals deal with more abstract concepts, such as Mahler symphonies and Schoenberg atonality. More educated people are also more likely to have taken a course on classical music, perhaps in college. There is also evidence that arts appreciation courses taken in college have an even stronger predictor effect on future attendance than earlier exposure. Thus those who

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<sup>57</sup> *Ibid.*

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never made it to college would have missed out on this opportunity.<sup>58</sup> Similar careers followed by people with similar educational backgrounds put them in further contact with one another. Such socialization may produce a social reason for people to attend concerts and promote conversation about the art form. The NEA likewise agrees that education is the best predictor of participation in the arts. It is more important than socioeconomic status, personal background, or age. However, it should be noted that getting an arts education or being exposed to art is largely a factor of socioeconomic status.<sup>59</sup>

Philip Hart writes about the importance of early music education and orchestral outreach programs. However, he notes that there have been no factual studies done on the effectiveness of such education programs. After all these years of youth programming, has there really been an increase in attendance? Hart recommends liaisons between school administrations and symphony orchestras as a good way of exposing students and children to classical music. On a less altruistic point, outreach programs are also helpful in soliciting funding from corporations and donors.

### Role of the Composer/New Music/Programming

Peter Heyworth stated during the Wheatland Foundation conference that “composers made the orchestra what it is today. Of course, social and economic factors also played their part, but basically it was the search for creators of new sounds and new fields of expression that pushed forward the frontiers of instrumental sound. This has changed. In short, composers in general are no longer ready to take the orchestra as they

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<sup>58</sup> Kevin McCarthy, Arthur Brooks, Julia Lowell, and Laura Zakaras, *The Performing Arts in a New Era* (RAND Corporation: RAND Publications, 2001), p. 23.

<sup>59</sup> Andreasen, Alan R, *Expanding the Audience for the Performing Arts*. National Endowment of the Arts Research Division Report #24 (Santa Ana, California : Seven Locks Press, 1991), p. 39, 51.

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find it. Developments within the orchestra are no longer part and parcel of developments in musical thinking.”<sup>60</sup> Hart likewise reports in his book that the primary purpose of the symphony orchestra should be to “translate the composer’s musical conception into sound that will communicate an artistic experience to the listener.”<sup>61</sup>

Electronic and computer music is another recent development in classical music. However, since such music is difficult to comprehend for many, in my opinion, it may not be as attractive to the general audience as more mainstream new classical music. But then again, it is difficult to predict tastes in music.

Crossover, or classical musicians performing music which may be considered outside the realm of classical music, may be another means for people new to classical music to first become familiar with the musical form. Examples of recent crossover projects include cellist Yo-Yo Ma’s recordings of bluegrass music with fiddler Mark O’Connor and bassist Edgar Meyer. Ma’s recent Silk Road Project, which explores music from the peoples who lived and traveled on the ancient Silk Road linking Europe to Asia also journeys beyond standard classical repertoire. Grammy-winning violinist, Joshua Bell, has also delved into crossover with his recordings of bluegrass music. Kennedy, the eccentric British violin virtuoso has played everything from Beethoven to Jimi Hendrix. Movie scores, which often are more accessible to the general audience, are often also performed by classical musicians. The world-renowned Itzhak Perlman performed the music for *Schindler’s List* and Joshua Bell the music for *The Red Violin*.

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<sup>60</sup> Wheatland Foundation, *The Evolution of the Symphony Orchestra: History, Problems, and Agenda* (London, 1986), p. 5.

<sup>61</sup> Hart, Philip, *Orpheus in the New World: The symphony orchestras as an American cultural institution—its past, present, and future* (New York: W.W. Norton & Company, Inc., 1973), p. 383.

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Musical points are often left out of current discussions on the audience and the symphony orchestra. Especially in the US, people tend to emphasize the practical benefits of the symphony orchestra to the local community. What often may end up coming up short is the art and the true purpose of a symphony orchestra. Of course a symphony orchestra and its performances will artistically enhance the community in which it is located and with outreach programs, will also benefit the underprivileged. However, it is important to always keep in mind the composer's key relationship to the orchestra. Closer collaboration and support of current and young composers should be stressed, along with the programming of new music.

### Ambience

Another key issue is that of the atmosphere of the orchestra. With an older population of concert-goers, the ambience is almost guaranteed to be more sedate than a rock concert or musical theater performance. There are, however, misinformed accusations of ambience problems. Some state that orchestra concerts are for "snobs," that it is only for those from the upper classes in fur coats who attend merely to be seen by others. This is mostly false. Although it is true that audience members are wealthier and more educated than the average population, it is rare to see people who attend in evening gowns and tuxedos (except perhaps in Vienna). Social snobbery and an elitist ambience should not be put forth as a scapegoat for audience attendance problems. True there are certain concert venues such as Avery Fischer Hall in Lincoln Center which may have more well-dressed audience members and a more formal atmosphere than a smaller concert hall, but at the same time, it is quite common to see concert-goers dressed in blue

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jeans at these same venues. An elitist image may have carried over from the past, and that can be mitigated through marketing and brand imaging, along with recruitment of a younger audience.

### The Role of the Music Director, Star Soloists and Guest Conductor, and Construction of a New Hall

All three of these elements produce the same effect on audiences. A good music director, a star soloist or conductor, and the construction of a new hall will all temporarily attract a larger audience. Many audience members will attend a concert simply because a certain maestro is conducting or their favorite cellist is performing. A change in the music director may attract attention due to curiosity or genuine interest in his performing skills. A new hall will also usually sell out seats for a couple of years after it is first built.

## **CHAPTER 3**

### **Eight Orchestras**

“It was the programs which made The Philadelphia Orchestra famous.”

Ed Cambron, Marketing Director of The Philadelphia Orchestra<sup>1</sup>

“We would like a less homogenous audience.”

Kim Noltemy, Marketing Director of The Boston Symphony Orchestra<sup>2</sup>

**I**n this chapter, I will examine the data and programs from eight case-study orchestras. This information will be based both on data from individual orchestral archives and personal interviews with the marketing directors of the selected orchestras. The thesis will address each of the orchestras individually in an attempt to come to a conclusion about the true state of audiences in the American orchestral world.

#### **3. 1. Philadelphia Orchestra (Philadelphia, PA)**

With the grand opening of The Kimmel Center last year, the Philadelphia Orchestra is expected to sell out tickets for the next couple of years.<sup>3</sup> Whether this audience attraction will continue after the novelty of a new hall has died down remains to

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<sup>1</sup> Cambron, Edward. Personal interview. 15 November 2002.

<sup>2</sup> Noltemy, Kim. Email to the author. 21 Nov. 2002.

<sup>3</sup> Woods, Simon. Personal interview. 31 April 2002.

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be seen. The Philadelphia Orchestra marketing structure and strategy is, like all major orchestras, based on the subscription system. Its marketing strategy is based on a buying process which moves from an individual buying a single ticket to that individual moving onto a small subscription, and then eventually to a big subscription.

Ed Cambron, the marketing director of The Philadelphia Orchestra, states that he does not “adhere to the idea that audiences are graying or dying out.” Instead, he believes that people attend symphony concerts more at the beginning and end of their adult lives. In other words, attendance is not so much due to age itself and the generation to which one belongs, but the point in the life cycle which one is in. For example, people tend to drop out of attending symphony concerts in their child-bearing years.<sup>4</sup> Age, however, does appear to be an important factor in the *frequency* of attendance at symphony concerts. For example, whereas 53% of younger ticket buyers reported attending over ten events by the Philadelphia Orchestra in the past year, 83% of those 65 and older reported doing so.<sup>5</sup> However this too could be attributed to life cycle rather than age itself. Younger people by and large are busier than retired people. Family concerts have also been instituted as a means of reaching out to busy young families who are less likely to attend. These have consistently been sold out. People of different ages and points in the life cycle process also tend to attend concerts on different nights of the week. For example, younger concert-goers and those with family and children had a higher preference for weekend nights, while those older than 65 preferred week nights and

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<sup>4</sup> *Ibid.*

<sup>5</sup> *Philadelphia Orchestra Marketing Strategy Project: Summary November 2, 2000.* Company Confidential, 2000.

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weekend afternoons. Results of this study also suggest that younger Philadelphia Orchestra ticket buyers might find smaller ticket packages more appealing.

Cambron also states that whereas in the 1980s, an individual was buying eleven tickets a year, people now buy 6.9 to 7.1 tickets a year. In other words, the number of different people who are attending concerts has gone up. Each person is simply attending fewer concerts. This is due to social changes in the past couple of years. For example, more women are working now than in the past, culture is more accessible, and there is less commitment to any one art form. People are trying out more different types of art, and thus will be attending each one less often.

In terms of the social atmosphere of concert attendance, Cambron states that it is more of an intellectual aspect of attending concerts than snobbery which wards potential audiences from attending symphony concerts. In other words it is not fur coats but not knowing not to clap between movements of a symphony which scares people off. In a rock or jazz concert, people can basically clap and shout whenever they please and it is acceptable to other audience members. However, people who clap at the wrong places or cough too loudly in a classical concert are usually looked upon distastefully by their fellow “more educated” concert-goers or the musicians themselves. Especially with the continual low quality of music education in public schools and the increasing marginalization of classical music in American culture, less and less of the younger generation will be educated in classical music, and thus more people will be potentially inhibited from attending due to lack of knowledge.

Simon Woods, the Artistic Director of the Philadelphia Orchestra, believes that the problem with gaining a future audience is mainly an educational one. He states that

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because the young people today are brought up largely without music education and in a culture where classical plays a more marginal role than the cultural atmosphere under which their grandparents grew up, they will be less likely to want to attend concerts in the future. In the past, classical music was widely broadcast on public radio and it was popular to have a piano in the house for children to practice on. Public music education was not wonderful to begin and it has not gotten any better. He states that about 75% of the older audience group was brought up with the idea that classical music was important and mattered. However, this can hardly be said to be true for the average teenager today.<sup>6</sup> But this may not necessarily mean young people are less interested in attending concerts. Interestingly enough, according to an independent study, within the Philadelphia Orchestra audience base, age is actually inversely associated with a desire to attend more live performances. Thus younger people actually do have high levels of interest in attending the symphony but are perhaps constrained by a busy lifestyle, lack of knowledge, and other inhibitions.<sup>7</sup>

Other inhibitions to concert attendance cited by Woods include the intimidating rituals of the orchestra (not clapping between movements for example), time-consuming and stressful travel into metropolitan areas for concerts, parking issues, and time. The first barrier can perhaps be broken done through better public relations, media, constant communication with patrons, and perhaps a more informal ambience to concerts. However this has the potential of alienating the core audience and serious and educated music lovers who may not enjoy the “dumbing down” of the concert experience.”<sup>8</sup> The

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<sup>6</sup> Woods, Simon. Personal interview. 31 April 2002.

<sup>7</sup> *Philadelphia Orchestra Marketing Strategy Project: Summary November 2, 2000.* Company Confidential, 2000.

<sup>8</sup> *Ibid.*

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other barriers are issues orchestras themselves cannot solve as easily. They are also problems which people attending other art forms and entertainments also face so perhaps they are less of a factor. According to an independent study carried out for the Philadelphia Orchestra, the most common barriers preventing people from attending concerts are lack of time and a preference to do other things with this time besides attending a symphony concert. A second barrier is that people would rather do something else with the amount of money needed to attend a concert. Driving and parking in Center City, Philadelphia was the third most popular barrier followed by lack of knowledge about and appreciation for classical music.<sup>9</sup> According to the same study, over 65% of people interviewed did not have the “specific knowledge about classical music to make an informed choice when deciding to purchase a ticket.”<sup>10</sup> In addition, only 5% of respondents were able to name the current Music Director of the Philadelphia Orchestra.

The independent study also made several recommendations on how the orchestra could better market to and attract audiences. First, they recommend that the concert experience be enhanced with a “multi-faceted, more vivid aesthetic.” Second, the level of interaction between musicians and the audience should be increased—for example, musicians on stage should try to speak directly to the audience about the music which they are performing as an attempt to break down the barrier between musicians and audience. Alternative presentation formats were also suggested, such as changes in the length of the concerts, the programs, locations of concerts, and start times. The study also suggests that the focus of marketing strategy be moved from emphasis on the product to the customer (both current and potential). The music should also be perhaps “re-labeled”

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<sup>9</sup> *Ibid.*

<sup>10</sup> *Ibid.*

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in a way that the audience can connect with it without much specific prior knowledge about classical music. The Philadelphia Orchestra should also seek to link its image more with the new Kimmel Center. And lastly, the orchestra should reduce its reliance on direct mail subscription and increase its presence in other advertising means such as through the Internet, thought leaders, and daily newspapers which are consistent with the targeted audience.<sup>11</sup>

### **3. 2. Boston Symphony Orchestra (Boston, MA)**

Kim Noltemy, Marketing Director of the Boston Symphony Orchestra (BSO) states that older, post-40 year old adults have always made up the core audience base of the BSO's attendees. Overall, she believes the orchestra to be in good shape in terms of audiences. She views the audience "problem" as one more to do with supply and demand. In other words, many orchestras expand the number of concerts they perform each year while the potential number of concert-goers fails to expand at the same rate. One aspect of audience development she would like to improve is attracting more college students and younger adults to concerts. She would also like to see a less homogenous audience. The BSO has an audience which is 70% subscription, and Noltemy cites audiences as having grown approximately 5% in the last 20 years. It should be noted however that general population growth in the US from 1992-2002 was 14% thereby suggesting that this audience growth may not be all that significant.<sup>12</sup> In terms of why people attend concerts, according to Noltemy Boston residents tend to attend for musical reasons rather than social. However, there is definitely a social component to it. "Fringe buyers" tend to

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<sup>11</sup> *Ibid.*

<sup>12</sup> [www.census.gov](http://www.census.gov). US Census.

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attend more for social reasons while pops audiences view the concerts mainly as entertainment.<sup>13</sup> The Boston audience is also musically well educated. According to a BSO market research study, more than half of BSO patrons play an instrument.<sup>14</sup>

A benchmark market research study was conducted for the BSO in 1999 and then redone in 2001 to compare how things have changed for better or for worse. According to this study, the percentage of BSO subscribers under the age of 50 increased by 12% within this time period. The median age of BSO attendees also decreased by 6 years while the number of students attending concerts increased by 5%. The loyalty of the BSO audience is also quite strong as evidenced by the increase of BSO ticket buyers donations from 3% to 50%. In addition, more than 38% of BSO audience members have been attending for more than 20 years. According to the study, patrons indicated that they would like to hear less contemporary music but are satisfied with the current amount of new music which is being performed.<sup>15</sup>

An interesting comparison was also made between subscribers and single ticket buyers. In general, subscribers have higher income levels and have a median age which is 6 years older than the single ticket buyer. The percentage of single ticket buyers with children in the house is higher than those of subscribers. Fewer single ticket buyers are retired or professionals.<sup>16</sup> This is perhaps further evidence that the subscription framework of marketing and ticket sales attracts an older, more established audience base whereas younger, busier people are more likely to attend as single ticket buyers. The market survey study concludes by stating that programs developed to attract younger

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<sup>13</sup> Noltemy, Kim. Email to the author. 21 Nov. 2002.

<sup>14</sup> "Boston Symphony Orchestra Market Research Study." Boston Symphony Orchestra, 2002.

<sup>15</sup> *Ibid.*

<sup>16</sup> *Ibid.*

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audience members have been working as evidenced by the increase in under-50 audience members between 1999 and 2001. The study also suggests that the image/branding of the orchestra focuses on aspects of the concert going experience which are most important to patrons.

The BSO has also made an attempt to reach younger potential audience members through specific educational programs. For example, the orchestra started formal youth concerts about 50 years ago and they currently reach about 40,000 children a year. These concerts are linked with in-school mentoring programs and teacher education programs. The orchestra also runs numerous outreach programs which have all expanded significantly in the last five years.<sup>17</sup> In addition, the BSO administers a College Card program to attract college students. By purchasing the \$25 card, college students have the opportunity to attend up to 20 performances by calling in the day of the concerts.

### **3.3. New Jersey Symphony Orchestra (Newark, NJ)**

The New Jersey Symphony Orchestra (NJSO) is different from most other professional orchestras in that it does not have one concert performance hall. Instead, the orchestra performs throughout the state in eight different venues ranging from the New Jersey Performing Arts Center (NJPAC) in Newark to the State Theatre in New Brunswick. According to Assistant Marketing Director of the orchestra, Catherine Brussel, audience members are often loyal to just one venue. However, interestingly enough this venue is not necessarily related to where the patrons live. Someone who lives an hour away from one venue but five minutes from another may instead drive one hour

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<sup>17</sup> Noltemy, Kim. Email to the author. 21 Nov. 2002.

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to attend a concert at their favored venue.<sup>18</sup> This is an interesting contrast to the Philadelphia Orchestra where drive time is a cited reason keeping people away from concert attendance. The audiences at each venue are also quite different in terms of demographics. It is like eight separate audiences, according to Brussel.

The age of the NJSO audience has stayed constant in the past 20 years with the average age of audience members hovering around 50 years of age. Brussel also agrees that the life cycle argument is valid. As a result, the NJSO has instituted numerous family programs to reach those age groups which tend to drop out of concert attendance. 86% of NJSO audiences are subscribers and their goal has been to raise this to 100%.<sup>19</sup> NJSO is thus definitely operating on a subscription based marketing strategy. For example, Brussel states that drawing in a large young audience is expensive to do and is not a major focus of their marketing strategy at the moment. The development office, however, is working on a program to attract young donors.

The orchestra has also made outreach and education programs a priority. The orchestra sends members of the orchestra to hospitals and libraries to play free concerts. Young people's programs have also been established in attempts to attract younger people. The NJSO Young People's Concerts have unfortunately been reaching fewer children in the past three years. Whereas 238 schools received concerts in Fiscal Year 1999-2000, only 174 schools were reached in Fiscal Year 2001-2002. The orchestra also holds family concerts and supports young artists and numerous youth orchestras in the state. In addition, the New Jersey Symphony Orchestra runs an innovative REACH (Resources for Education and Community Harmony) program which makes over 150

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<sup>18</sup> Brussel, Catherine. Personal interview. 05 December 2002.

<sup>19</sup> *Ibid.*

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visits in the state featuring a variety of programs geared towards greater understanding of and raising of support for symphonic music. These visits consist of many different services including fund-raisers, master classes, in-community performances, and private lessons. The program is four years old and has provided programming for a variety of age groups and for organizations such as The Girl Scouts of America and the Governor's Office. This program is a good example of the community service vision of many American orchestras.<sup>20</sup> An example of the use of music as a form of public service is in providing a school-independent arts education to underprivileged youth. Arts education has been shown to have a positive academic effect on students. Thus exposing children to the arts not only makes them more culturally aware, but improves their chances for academic and future success as well.

Brussel also states that music education is not necessarily a requirement for attending symphony concerts. In fact, many knowledgeable about classical music stay at home. Marketing is thus more of an effort to get people to want to experience live music, not necessarily just to educate them on the music which they will hear.<sup>21</sup>

### **3.4. Pittsburgh Symphony (Pittsburgh, PA)**

Data from the Pittsburgh Symphony is less optimistic than other orchestras. The number of Pittsburgh Symphony classical seats sold has decreased gradually since 1979. According to this study, the number of seats sold in many of the top orchestras has also decreased since the 2000-2001 season. Pittsburgh has seen its number of seats sold decline 7%, Cleveland by 8%, San Francisco by 5%, New York by 11%, and Atlanta by

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<sup>20</sup> [www.njsymphony.org](http://www.njsymphony.org).

<sup>21</sup> Brussel, Catherine. Personal interview. 05 December 2002.

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5%. The orchestras that have increased the number of seats sold include the Philadelphia by 8% (mostly due to the opening of the new hall), Los Angeles by 7% (also due mostly to construction of a new hall), Houston by 9%, and Minnesota by 15%. Boston and Chicago both did not see any changes in the number of seats sold. Out of twenty-one orchestras, only six have grown in the number of seats sold. The rest have all declined.<sup>22</sup> The Carnegie Hall “Great American Orchestra Series” witnessed a 38% fall in its number of subscribers. The hall’s “Introduction to the Classics Series” likewise fell 52% in one year. However, these changes are most likely largely due to the events of September 11<sup>th</sup> and not due to any specific musical or marketing reason. When the economy gets worse, attendance at performing arts events likewise drops.

The study also cites several elements that have generated sales for the Pittsburgh Symphony in recent years in addition to impediments. Sale generators include student programs, seniors discount programs, very accessible programming, subscriber incentive concerts featuring star performers, and half price subscription promotions. Impediments include large subscription price increases (from 4% to 11%) in the past five seasons. There has also been an elimination of half-price promotions and “early bird” discounts which have most likely made the purchase of tickets more expensive and less flexible. In addition, the subscriber base has decreased, turning into single ticket buyers. The orchestra has also programmed more challenging and new works such as those by Shchedrin and Hersch. The average ticket price has also risen steadily since 1991. All of these elements may have contributed to the decrease in sales in the past five years.<sup>23</sup> One

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<sup>22</sup> “Pittsburgh Symphony: What Can we do to Improve our Current Attendance and Revenue Situation?” Pittsburgh Symphony, 2002.

<sup>23</sup> *Ibid.*

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of the effects of the 2001 terrorist attacks was a shift of the audience from subscriptions to single ticket purchases. Single tickets are more difficult to market and will continue to remain a challenge for marketers. A change in the quality of performances, programs, and conductors may be another factor, although no study has been undertaken in this area for the Pittsburgh Symphony.

The Pittsburgh Symphony has also instituted outreach programs, student programs, and adult education programs. The *Mellon Grand Classics* student program has grown from an average of 564 students per concert in the 2000-2001 season to 712 students per concert in the 2002-2003 season. Innovative programs for families and children include those such as *Tiny Tots*, a program for school and preschool groups. *Unlocking the Classics*, which seeks to better educate audiences, is an educational program especially designed for adults.

### **3.5. Brooklyn Philharmonic (Brooklyn, NYC)**

The Brooklyn Philharmonic, which performs in the Brooklyn Academy of Music, otherwise known as BAM, is different from the above orchestras in that it is what can be called a “niche” orchestra. In other words, it is a smaller organization which only plays about five concerts a year, usually pieces outside the core repertoire. Because the orchestra needs to compete with larger, more mainstream orchestras in New York City such as The New York Philharmonic, it much market itself in a way which differentiates itself. The orchestra would be unable to survive playing the repertoire which the NY Philharmonic regularly performs. It also does not have the money or resources to hire star

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soloists to attract audience. As a result, the orchestra must rely on innovative programming and crossover.

According to marketing director, Kathleen Drohan, more people are going to arts events than before, and they are attending more frequently. They are, however, not attending as regularly. Drohan is optimistic about audiences—she does not believe that audiences are dwindling but that people are simply purchasing their tickets differently. People are also attending more different kinds of art. She views this as a good thing—what is good for one art form is also good for another.

What is interesting about the Brooklyn Philharmonic audience is that it is much younger than the symphony audience member in general. The average age is 40 whereas in New York City and most of the rest of the country, the average age lingers around 50. The reasons for this are many. First, the thematically programmed concerts are more attractive to younger people. Non-traditional crossover programs with other arts groups such as the Mark Morris Dance Company may also help bring in a younger audience. For example, last year, the orchestra ran a “Power of Shakespeare” series which programmed musical works based on Shakespearian plays. If one knew something about Shakespeare, one would have been better able to connect with the music.

It has also been shown that younger people are more attracted to newer music and more innovative programming. This can likewise be seen in the San Francisco Symphony which is known for its younger audience, dynamic conductor, and inventive programming. It is also interesting that the Brooklyn Philharmonic is only 25% subscription.<sup>24</sup> This may be another reason for the larger proportion of younger audience members. For example 42% of single ticket buyers are between the ages of 18 and 44 and

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<sup>24</sup> Drohan, Kathleen. Personal interview. 06 December 2002.

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20% of single ticket buyers are younger than 35. Even among subscribers, the age is younger than usual, with nearly 40% of subscribers under the age of 54.<sup>25</sup> The Brooklyn audience is also more educated than the average orchestral concertgoer. For example Brooklyn Philharmonic audiences called themselves “critical listeners” two-thirds times more than the average US orchestra audience rate. In addition, more than 70% of the audience has sung or played a musical instrument.<sup>26</sup>

The Brooklyn Philharmonic also views outreach highly. It holds about 500 outreach programs a year in the local community. They also have an in-school program to educate young people and a chamber music program at the local museum which is themed to match current exhibitions there. This allows people well versed in art to learn more about music and vice versa. According to Drohan, the “goal of outreach programs is to acknowledge that people ingest art in different forms, not just in one place.”<sup>27</sup> The Philharmonic also holds concerts in parks, libraries and holiday music in the Brooklyn Academy of the Arts. Drohan also believes that music education helps students do better academically and thus she tries to target Brooklyn schools with symphony outreach.

### **3.6. Atlanta Symphony (Atlanta, GA)**

Atlanta Symphony marketing director, Charlie Wade, also agrees that symphony orchestra attendance is a life cycle issue. The orchestra is not graying, but younger people in their 20s and 30s and those 50 and older will be more prone to attend. In between those years, people tend to attend less often because of the strains of family and careers.

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<sup>25</sup> *Ibid.*

<sup>26</sup> *An Invitation to Innovative Sponsorship and Underwriting Opportunities 2002-2003*. Brooklyn Philharmonic.

<sup>27</sup> *Ibid.*

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However, he does wonder if the Baby Boom generation will start subscribing due to the different musical atmosphere in which they grew up. This, in turn, could affect future audiences. The volume of sales has also gone up but there is a lower commitment level from the audience. The average number of subscriptions per person has also decreased. The building of a new hall and the appointment of a new music director in Atlanta is expected to help raise audience numbers for a while.

Wade talks not only of the life cycle of an orchestra's audience members, but the life cycle of an orchestra itself.<sup>28</sup> For example, how established and how much money an orchestra has affects how much audience it will be drawing in. The average age of the Atlanta Symphony audience member is, like most orchestras, around 50. One barrier to orchestra attendance according to Wade is the perception that the orchestra is stuffy. He believes that the atmosphere of the orchestra concert is a major reason why people do not attend concerts. Price is another deterrent. However, the root of the problem, according to Wade, is the lack of convenience. People often enjoy classical music on a short term basis. People today have shorter attention spans and sitting through a serious two hour concert may be too draining for many. He has attempted to help better these problems by programming works by new composers. But the negative side affect of this is that it may alienate one's core audience.

The Atlanta Symphony also runs outreach, family, and children programs. In addition, the orchestra hosts adult music education programs and a youth orchestra to train young musicians. The Atlanta Symphony Orchestra's Outreach Programs called

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<sup>28</sup> Wade, Charlie. Telephone interview. 26 November 2002.

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*Partners in Performance* increase community access to and awareness of the orchestra. *The Neighborhood/Community Partnership*, *The In-School Partnership*, *The Young Classical Musicians Partnership*, and *The Service Organization Partnership* are further programs run by the symphony to increase community involvement. Wade is also attempting to make ticket prices more accommodating and to build a better connection with the local TV station for greater media coverage.<sup>29</sup>

### **3.7. Portland Symphony (Portland, ME)**

Camille Cooke, marketing director of The Portland Symphony, also states that subscriptions are the basis of their audience. They have been making significant efforts to get younger people to subscribe.<sup>30</sup> This might be problematic, however, due to the tendency for younger people not to commit to an entire season's long worth of concerts. Cooke also states that loyal audiences which trust the music director are what comprise a solid audience base. The average age of the Portland audience is around 50-55 years of age, whereas the pops audience is much older with an average age of around 65. This is interesting—the same phenomenon can be found at the Boston Pops in that the audience there is also a bit older than the regular series. Although she did not have the statistics to back up this point, Cooke also does not believe the symphony audience is graying, but that classical music has always attracted a more mature audience. Because a subscription is basically a commitment to an organization, younger people will be less willing or ready to do so. However, the orchestra is working on packaging concerts in a way which

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<sup>29</sup> *Ibid.*

<sup>30</sup> Cooke, Camille. Phone interview. 04 December 2002.

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will be attractive to young professionals and families. Cooke too is in support of the life cycle theory of concert attendance.<sup>31</sup>

In terms of the quality of the audience, Cooke asserts that although some do attend for social reasons, most in Portland do, in fact, attend for musical ones. The audience is not too happy when concerts are “dumbed down.” She also states that people enjoy being stretched by exposure to new music.

The Portland Symphony too believes strongly in outreach and education. It holds *Kinderkonzerts*, which introduce children ages three to seven to live symphonic music and the different types of orchestral instruments through fun interactive programs with members of the Portland Symphony. In addition the symphony administers *Youth Concerts* for children ages seven to thirteen. *Sunday Classical Concerts* and *Music Camp* are two other programs designed to reach out to a broader population. Education programs for high school and college students such as open dress rehearsals and master classes are also available. Unfortunately there is a lack of data on how successful such programs have been to audience development.<sup>32</sup>

### 3.8. Philharmonic Orchestra of New Jersey (Warren, NJ)

The Philharmonic Orchestra of New Jersey (PONJ) is different from all the other case study orchestras in this thesis due to its innovative Discovery Concerts™ and *Perceptive Listening Courses*. Maestro George Marriner Maull has made it his orchestra’s priority not only to perform, but to educate its listeners as well. The mission of this orchestra is therefore not primarily as a performing organization but as an

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<sup>31</sup> *Ibid.*

<sup>32</sup> <http://www.portlandsymphony.com/>

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educational one. The orchestra is also precedent in that it has actually tested whether or not its Discovery Concerts™ (concerts geared towards introducing new listeners to the symphony orchestra) have been helpful in increasing people's understanding of classical music and raising their attendance rates.

Maull writes in his article "The Challenges Facing Classical Music" that there is a misconception about the idea of "listening." People often state that they "listen to classical music all day long" in their offices. In other words the radio dial is set to the classical channel. Or they switch the radio to the classical station while they clean the house. However, this may not necessarily mean that they are actually *listening* to the music. The music serves merely as background "wallpaper." This argument is a bit exaggerated; there are of course those who do in fact absorb and listen carefully to the music while undertaking other activities but I do agree that, in general, in order to listen to a piece of music as complex as a Beethoven symphony, one must sit and listen with the utmost attention with no distractions whatsoever.<sup>33</sup> One would not be able to read a T.S. Eliot poem to its full extent while simultaneously undertaking other endeavors; the same should be said for listening to a Shostakovich symphony. Ed Cambron of the Philadelphia Orchestra also found this same concept to be a major flaw of the Knight Foundation study.

The first Discovery Concert™ was presented in 1996. These concerts consist of a short 5-10 minute movement of a larger symphonic work. This snippet of music is then followed by a casual conversation between Maestro Maull and the audience. Audience members are encouraged to participate by asking questions and making comments about

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<sup>33</sup> Maull, George Marriner Maull. "Discovery Concerts: The Challenges Facing Classical Music." Philharmonic Orchestra of New Jersey, 2002.

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the music which they had just heard. More musical excerpts are then performed, interspersed with conversation from the stage. There is also a printed Listening Guide available to audience members with a simplified presentation of the score and musical markings to indicate what is occurring in the music. At the conclusion of the concert, the entire piece is performed from beginning to end without pauses. Hopefully by this time, the audience will have gained a deeper understanding of and be listening critically to the music. Not only does this educate the audience member, but also hopefully spurs him or her on to listen to and learn more about symphonic music. Discovery Concerts™ are especially important because devices such as pre-concert lectures and annotated program notes (which orchestras have been presenting for some time now) have been shown to appeal mainly to listeners who are already knowledgeable about classical music. Those who are “casual listeners” and do not have any prior exposure to the music may need something in the format of the Discovery Concert™ to gain a better understanding of the music they are hearing.<sup>34</sup>

The PONJ followed up this special listening concert series with an audience survey to see what effects the concerts may have had in audience education and development. Overall, the results were very positive. Attendees cited improved understanding of details and complexities in the music, and a resulting greater enjoyment of the music. 97% of those surveyed said that they would attend similar future programs. Overall, 89% responded with positive comments.<sup>35</sup> Concerts like these would be more difficult to carry out in larger and major symphony orchestras but if made possible,

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<sup>34</sup> Maull, George Marriner Maull. “Discovery Concerts: The Challenges Facing Classical Music.” Philharmonic Orchestra of New Jersey, 2002.

<sup>35</sup> *Vivaldi Discovery Concert Audience Survey*. Philharmonic Orchestra of New Jersey.

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would help educate audiences and meet an educational need which many audience members may seek but are unable to find.

In addition to the Discovery Concerts™, the Philharmonic Orchestra of NJ also runs a *Perceptive Listening Course, Listening Seminars, and Listening Lectures*. Since 1992, thousands of people have attended these courses. Presentations have also been made to schools for the music edification of younger students. In addition, individual listening workshops have also been presented to inner city children working through outreach programs such as The Boys and Girls Clubs of Newark.

### **3.9. Concluding Remarks**

Three major themes resulted from the orchestra case studies—the importance of education and outreach to the orchestras, the general consensus among marketing directors that the average age of the audience is not rising, and agreement with the life cycle theory. All of the case study orchestras have taken outreach and the music education of its audience very seriously. With the decline of classical music's impact in American culture and a continuing decline in music education in the schools, orchestras have taken it into their own hands to educate their own audiences. However, the approach to this must be undertaken carefully. Those who are novices to symphonic music need to be guided step by step through the music in order for them to come to a fuller understanding of symphonic music. Only through carefully perceptive listening courses or Discovery Concerts™ like those of the PONJ can this be realized.

In addition, it can be surmised from the information garnered from the case study orchestras that orchestral audiences are not graying, but that the average age has tended

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to be somewhat older than the average population. However, even this is not always the case as can be seen in the Brooklyn Philharmonic example. With innovative programming and a marketing scheme based on single tickets rather than subscriptions, a younger audience can indeed be recruited. Interest in the symphony does exist among young people as evidenced by data collected by the NEA and Knight Foundation study. Based on the case studies, it is mainly the marketing structure and strategy which is to blame for the lack of younger people at concerts. Smart brand imaging of the orchestra can likewise attract a younger audience. The marketing directors of almost all of the examined orchestras also cited life cycle as a key determinant of whether one will attend the symphony.

## CHAPTER 4

### Data, Data, Data

“The classical music audience is aging faster than the population as a whole. In 1982 those under thirty years of age comprised 26.9 percent of the audience and by 1997 comprised just 13.2 percent of the audience. Over this same span of years, those over sixty years of age rose from 15.6 percent to 30.3 percent of the classical music audience. By 1997, a higher proportion of the classical music audience was over sixty than was the audience for any other performing art form.”

-NEA Research Division Report #42<sup>1</sup>

“The findings with respect to the family life cycle are intriguing...Several of these findings support our earlier speculation that arts participation is curvilinear with respect to the family life cycle because the presence of children imposes both financial burdens and other responsibilities on these households.”

-NEA Research Division Report #24<sup>2</sup>

**I**n this chapter, I will examine firsthand data taken from numerous NEA reports, the Knight Foundation study data set, American Symphony Orchestra League, and individual orchestra data sets in order to examine the question of age and symphonic audiences based on hard data. Due to the lack of such data from twenty or even ten years ago, it is difficult to make comparisons across time.

Thus conclusions in this chapter will have to be based on the here and now.

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<sup>1</sup> Richard A. Peterson, Pamela C. Hull, and Roger M. Kern, *Age and Arts Participation: 1982-1997*. National Endowment of the Arts Research Division Report #41 (Santa Ana, California : Seven Locks Press, 2000), p. 2.

<sup>2</sup> Andreasen, Alan R, *Expanding the Audience for the Performing Arts*. National Endowment of the Arts Research Division Report #24 (Santa Ana, California : Seven Locks Press), 1991, p. 30.

### 4.1. Data from NEA Reports

In this section, I will first examine data charts from the 1997 NEA Survey of Public Participation in the Arts (SPPA), followed by an independent statistical analysis that I carried out. Looking at the 1997 SPPA study dataset, attendance at classical music concerts is fairly even across age groups. Those between the ages 45-54 were the most prominent group with a 20.4% attendance rate. Next was the group aged 65-74 with 17.9% attending. The third highest attending age group was interestingly those aged 18-34 with 16.4% followed by 16.3% for the 55-64 year olds. The 35-44 age group attended at a 14.3% rate, those 75 and older at 13.8%, and those 25-34 attending in the smallest percentages with 11.4% (Table 4.1).<sup>3</sup>

**Table 4.1**

AGE	SYMPHONY ATTENDANCE
45-54	20.4%
65-74	17.9%
18-34	16.4%
55-64	16.3%
35-44	14.3%
75+	13.8%
25-34	11.4%

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<sup>3</sup> National Endowment of the Arts, *1997 Survey of Public Participation in the Arts: Summary Report*. Research Division Report # 39 (Washington, D.C., 1998).

## **Data, Data, Data**

Audience attendance is quite level between age groups, with the greatest discrepancy in the age groups of 75 and older and those between 25-34. The smaller percentage of those 75 and older attending can easily be explained by age and the greater propensity of ill health in this age group. The smaller percentage of people attending between the ages of 25 and 34 can be explicated by the family life cycle theory which asserts that people are kept busy balancing careers with families during these years and have less time for leisure. Those 35-44 are most likely still in this point in the life cycle although slowly moving out of it, as evidenced by their slightly greater percentages of attendance. Those between the ages of 45 and 74 have more leisure time and resources to attend concerts. What is interesting is that those between the ages of 18 and 34 were the third highest percentage group in classical music attendance, which counters the argument that young people do not have an interest in attending classical music concerts. Despite the busyness of people of this age, they still make time to attend. According to the life cycle theory, it is only when they reach that point in their lives where career and family responsibilities take over that they drop out of concert-going for a few years.

There is a rather disconcerting survey taken from the "Age and Arts Participation" NEA report depicting an aging audience. The study compares age groups percentage contribution to total classical music attendances by year, similar to the SPPA 1997 study. However, the age groups are broken down more specifically. The 18-19 age group attended concerts at a rate of 5.4% in 1982, compared with 1.8% in 1997. The 20-29 age group attended concerts at a rate of 21.5% in 1982, but only 11.4% in 1997. Likewise the 30-39 group attended at a 24.5% rate in 1982 and 13.7% rate in 1997. The older cohorts

## Data, Data, Data

all increased their attendance from 1982-1997 (Table 4.2).<sup>4</sup> The NEA states that these findings reveal a graying audience. However, again such data should be taken with a grain of salt. Methodological methods such as survey collection and phone interviews were conducted differently and it is not entirely reliable to compare data collected from 1982 with that collected in 1997.

**Table 4.2**

<b>Age</b>	<b>1982</b>	<b>1997</b>
18-19	5.4%	1.8%
20-29	21.5%	11.4%
30-39	24.5%	13.7%

Another table in the SPPA 1997 study shows that the median age of the classical music audience member in 1992 was 45 whereas in 1997 it was 46. The median age of the US resident population also increased 1.5 years during this time period from 1992-1997.<sup>5</sup> Thus, it can actually be said that the classical music audience “became younger” in these five years.

Another interesting survey conducted in this study was a comparison of music preferences among respondents from 1982-1997. This produced results which also bode well for the future of classical music. For example, in 1982, 28% of respondents stated that they liked classical and chamber music. By 1985, this figure had grown to 30%. By

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<sup>4</sup> Richard A. Peterson, Pamela C. Hull, and Roger M. Kern, *Age and Arts Participation: 1982-1997*, National Endowment of the Arts Research Division Report #41 (Santa Ana, California : Seven Locks Press, 2000), p. 18.

<sup>5</sup> National Endowment of the Arts, *1997 Survey of Public Participation in the Arts: Summary Report*, Research Division Report # 39 (Washington, D.C., 1998), p. 23.

### Data, Data, Data

1992, the figure moved to 33% and in the last survey conducted in 1997, the figure was 48% (Table 4.3).<sup>6</sup> However, methodological methods have changed drastically since 1982 and the means by which the surveys were conducted and the data treated are most likely quite different as well. The growing interest in classical music can also be attributed to a maturing US population at large. Classical and chamber music tied with Jazz for sixth place in the genre of music which Americans most liked. Number one was Mood/Easy at 67%, followed by Country-Western at 65%, Blues/R&B at 63%, Rock at 60%, and Hymns/Gospel at 58%.<sup>7</sup> With the greater crossing over of music listening tastes, people in this century will most likely listen to more different types of music, thus potentially drawing in more audience for classical music. There is less distinction between the different genres of music than in the past. Again, an example of this can be seen in the crossover recordings which many eminent classical musicians have released. Classical music's "Liked" rank also moved up to 7 in 1997 from 8 in 1992. The "Liked Best" rank of classical music also moved up one rank from 5 in 1992 to 4 in 1997.<sup>8</sup>

**Table 4.3**

#### LIKED CLASSICAL MUSIC

1982	1985	1992	1997
28%	30%	33%	48%

One last survey conducted by this study divided up interest in classical music geographically. This too was pretty level across the US, spanning from a high of 18.9%

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<sup>6</sup> *Ibid*, p. 67.

<sup>7</sup> *Ibid*, p. 67.

<sup>8</sup> *Ibid*, p. 48.

## Data, Data, Data

in New England<sup>9</sup> to 10.4% in the East South Central region (which includes Kentucky, Tennessee, Mississippi, and Alabama). The second biggest concert-goers of classical music are the Mid-Atlantic States<sup>10</sup> at 17.5%, followed by the Pacific<sup>11</sup> at 17.2%, East North Central<sup>12</sup> at 16.0%, West North Central<sup>13</sup> at 15.9%, South Atlantic<sup>14</sup> at 14.4%, West South Central<sup>15</sup> at 14.3%, Mountain<sup>16</sup> at 14.0%, and East South Central<sup>17</sup> at 10.4% (Table 4.4). Those in the state of Massachusetts had the greatest classical following with 24.3% of the population. This is perhaps due to higher education and income levels in the state, or the high volume of universities in the Boston area. This was followed by the states of Alaska, Hawaii, Oregon, and Washington combined at 21.0%. In terms of metropolitan areas, Boston leads the crowd in attendance at a rate of 23.2%, followed by Detroit at 22.7%. Third is San Francisco at 22%. The rest of the lineup is New York at 19.5%, Chicago at 16.8%, Los Angeles at 14.4%, and Philadelphia at 14.9%.<sup>18</sup>

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<sup>9</sup> Massachusetts, Maine, New Hampshire, Vermont, Connecticut, and Rhode Island

<sup>10</sup> New York, Pennsylvania, New Jersey

<sup>11</sup> California, Alaska, Hawaii, Oregon, and Washington

<sup>12</sup> Ohio, Michigan, Illinois, Wisconsin, and Indiana

<sup>13</sup> North Dakota, South Dakota, Minnesota, Iowa, Nebraska, Kansas, and Missouri

<sup>14</sup> Florida, Georgia, South Carolina, North Carolina, Virginia, West Virginia, District of Columbia, Maryland, and Delaware

<sup>15</sup> Texas, Oklahoma, Arkansas, and Louisiana

<sup>16</sup> Montana, Idaho, Wyoming, Nevada, Utah, Colorado, Arizona, and New Mexico

<sup>17</sup> Kentucky, Tennessee, Mississippi, and Alabama

<sup>18</sup> National Endowment of the Arts, *1997 Survey of Public Participation in the Arts: Summary Report*, Research Division Report # 39 (Washington, D.C., 1998), p. 52.

## Data, Data, Data

**Table 4.4**

REGION	INTEREST IN CLASSICAL MUSIC
New England	18.9%
Mid-Atlantic	17.5%
Pacific	17.2%
East North Central	16.0%
West North Central	15.9%
South Atlantic	14.4%
West South Central	14.3%
Mountain	14.0%
East South Central	10.4%

Because I do not believe that it is statistically reliable to compare orchestra data collected from fifteen years ago with data collected in 1997, I undertook an independent analysis of the data from only the 1997 SPPA data set to determine what the age break down in classical music attendance in more recent times might be. The data set was based on the question “Did you attend a live classical musical concert in the last twelve months?” Age groups were recalculated into the following age divisions: 18-34, 35-44, 45-54, 65-74, and 75+. The numbers were weighted. Again the results were pretty level across age groups. The age group with the highest percentage was those aged 45-54 with 19.9% having attended in the last 12 months, followed by the 65-74 group with a 17.8% attendance. The 55-64 age group attended at 16.6%, followed by 75+ at 14.4%, 35-44 at

## Data, Data, Data

14.3%, and 18-34 at 13.3% (Table 4.5).<sup>19</sup> Although the two youngest age groups had the lowest percentages of attendance, the difference between 19.9% and 13.3% is not terribly large. Attendance does also not necessarily mean interest in classical music. Again, it is important to keep in mind that younger people may be more constrained by time and family responsibilities. Marketing strategies and the subscription system are also less geared towards them.

**Table 4.5**

AGE	ATTENDED SYMPHONY IN LAST 12 MONTHS
45-54	19.9%
65-74	17.8%
55-64	16.6%
75+	14.4%
35-44	14.3%
18-34	13.3%

### **4.2. Data from the American Symphony Orchestra League (ASOL)**

Data from the ASOL is mostly confidential so I was only able to acquire a limited selection of data from the organization. The numbers reported by the ASOL also do not take into account important elements such as population growth and inflation. Thus,

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<sup>19</sup> SPPA 1997 Data Set, reconfigured at Firestone Library Data Analysis Lab, Princeton University, Princeton, NJ

## Data, Data, Data

reports by the organization that symphonic audiences have grown enormously and that symphony profits are on the rise are exaggerated.

For example, Jack McAuliffe of the ASOL reported that “earned revenue for America’s 1200 adult orchestras was at \$775 million in 2000-2001, up 70% from 1990.”<sup>20</sup> He likewise reported that “attendance for America’s 1200 adult orchestras was in excess of 32 million in 2000-2001, up 16% from ten years ago.”<sup>21</sup> These figures are misleading, however, because inflation and population growth are not taken into account, which greatly skews the information which these numbers portray. The ASOL should report its figures with inflation and population growth taken into account so the public is not misinformed about the true state of American symphony orchestras. Once the revenue figure is adjusted for inflation, there is in fact still a 33% increase in earned revenue for America’s 1200 adult orchestras. Although this is pleasant news, it is a significant difference from the 70% figure reported by the ASOL.

Attendance figures are less rosy once population growth is taken into account with a 2.6% *decrease* in orchestra attendance in the last ten years. This is indeed a significant difference from the reported ASOL 16% increase in attendance. However, one other important aspect of these figures is that they only display the bulk number of seats sold, not the actual percentage of the population that attends symphonic concerts. In other words, the ASOL has no means of distinguishing between repeat attendees and one-time attendees. For example, if one person purchases ten seats all for himself, this is quite different from another person purchasing ten seats for ten different colleagues from work. This means that even if total attendance is down, one might still have more “different”

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<sup>20</sup> McAuliffe, Jack. Email to the author. 05 January 2003.

<sup>21</sup> *Ibid.*

## **Data, Data, Data**

people attending. In other words, the audience base might still be broadening and reaching out to more different people than in the past despite the overall decrease in attendance. According to Mr. McAuliffe, “the number of different individuals attending at least once is probably up substantially, as the number of concerts purchased on an individual subscription has been declining from an average of more than 12 concerts per subscription twenty years ago to less than six today. Of course, subscription isn’t the only way folks buy tickets, but it still accounts for two-thirds to three-quarters of the sales.”<sup>22</sup>

In addition, the figures only pertain to the 1200 member orchestras of the ASOL. The American population does not just attend concerts given by these member orchestras but performances at churches, high schools, universities, and community orchestras as well. As a result, the attendance figures should be higher than what is reported above. People are also buying tickets in a different manner. They are more last minute about ticket purchases, and buy fewer concerts if they do subscribe. These changes in buyer styles can further skew the figures from what is really going on.

### **4.3. Data from Knight Foundation Study**

In this section, I will analyze data compiled by the Knight Foundation Classical Music Consumer Segmentation Study. Issues ranging from the age of audience members to opinions of audience members of contemporary classical music will be addressed. The discussion of age and symphony attendance will also be followed by an independent analysis of certain parts of the dataset that I carried out.

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<sup>22</sup> McAuliffe, Jack. Email to the author. 14 January 2003.

## Data, Data, Data

I will first clarify the methodology of the Knight Foundation study. The study was first carried out on a national level. In February 2001, 700 pre-test interviews were completed across the two markets of Charlotte and St. Paul. After the pre-test, the interview protocol was refined and 2,200 telephone interviews were conducted in March 2001.<sup>23</sup>

The study was then carried out based on 15 different market areas, each of which contain a major symphony orchestra. These 15 market areas include the following orchestras: 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, Oregon Symphony Association, Philadelphia Orchestra, Saint Louis Symphony Orchestra, Saint Paul Chamber Orchestra, Symphony Society of San Antonio, and the Wichita Symphony Society. The survey spans a wide and diverse geographic and demographic range of the US, while also covering a wide range of levels of orchestras from the world-renown of the Philadelphia Orchestra to the young training orchestra level of the New World.<sup>24</sup>

About 750 telephone interviews were conducted in each of the 15 markets between August 2001 and March 2002. The people telephoned were within the geographical area from which the orchestra draws 85% of its ticket buyers. A total of 11,318 telephone interviews were completed. The protocols for these interviews were basically identical to the national survey protocol, with additional questions on

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<sup>23</sup> John S. and James L. Knight Foundation, *Classical Music Consumer Segmentation Study: How Americans Relate to Classical Music and Their Local Orchestras* (Southport, CT: Audience Insight LLC, 2002), p. A-6.

<sup>24</sup> *Ibid*, p. A-8.

## Data, Data, Data

respondents' connections with their local orchestras.<sup>25</sup> In addition, a total of 1,500 postal surveys of each orchestra's subscribers and single-ticket buyers were conducted between August 2001 and February 2002. About 750 surveys were mailed to subscribers and 750 were mailed to single-ticket buyers.<sup>26</sup>

Overall, a total of 10,098 valid responses were collected, with 5,553 from current subscribers, 1,657 from former subscribers who are now single-ticket buyers, and 2,888 from current single-ticket buyers who had never been subscribers. The response rate averaged about 38% across all 15 markets and 35% for the national survey. In addition, the figures were mathematically weighted to align the results with important demographic variables such as education, gender, income, and race.<sup>27</sup>

According to the study, 17% of the population in the national survey and 20% of the population in the 15 market survey attended a classical music concert in the past 12 months.<sup>28</sup> Current symphony subscribers attended at a rate of 87%, former subscribers at 81%, and single-ticket buyers at 70%. Subscribers are thus more prone to attend a classical music concert than single-ticket buyers but this may not necessarily correlate with interest in attending, but be perhaps more a result of the ticket marketing structure. The so-called "potential classical music consumer" or individual which shows any amount of interest in attending classical concerts attended symphony concerts at a rate of 27%.<sup>29</sup>

Studies were also undertaken on the effects of age and the presence of children on concert attendance. What is most striking is that single-ticket buyers are younger than

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<sup>25</sup> *Ibid*, p. A-7.

<sup>26</sup> *Ibid*, p. A-9.

<sup>27</sup> *Ibid*, p. A-11.

<sup>28</sup> *Ibid*, p. A-93.

<sup>29</sup> *Ibid*, p. A-106.

### Data, Data, Data

subscribers. For example, while in the age group 65-74, 29% of respondents in the 15 market surveys were subscribers, only 2% of the age group 18-34 were. The second most popular age group among subscribers was those 55-64 at a rate of 27%, followed by 45-54 at 18%, 75+ at 17%, 35-44 at 7% and 18-34 at 2% (Table 4.6). The data is less grim in terms of attracting a younger audience in single ticket buyers, however. The age group 45-54 was the most popular age group in single-ticket sales at 25%, followed by 55-64 at 20%, 35-44 at 18%, 65-74 at 15%, 18-34 at 14%, and 75+ at 9% (Table 4.7).<sup>30</sup> This shows that the youngest cohort bought single-tickets at about the same rate as those 65-74. The difference in age groups and single-ticket purchases is also less drastic than that seen in the subscribers' statistics.

**Table 4.6**

AGE	SUBSCRIBER
65-74	29%
55-64	27%
45-54	18%
75+	17%
35-44	7%
18-34	2%

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<sup>30</sup> *Ibid*, p. A-142.

## Data, Data, Data

**Table 4.7**

AGE	SINGLE TICKET BUYERS
45-54	25%
55-64	20%
35-44	18%
65-74	15%
18-34	14%
75+	9%

It is also interesting to examine age and the potential classical music consumer. The youngest age group (18-34) had the greatest percentage of potential audiences at 33%, followed by 20% at 35-44, 18% at 45-54, 16% at 55-64, 9% at 65-74, and 5% at 75+ (Table 4.8).<sup>31</sup> Perhaps younger people are more open to new art forms, and this decreases with age. This bodes well for marketing directors who are targeting a younger audience—the above data show that there is a potential younger audience willing to “try out” classical and symphonic music. It should be noted, however, that the percentage of people who are *not* potential classical music consumers also decreases with age. Whereas 31% of those ages 18-34 were not interested in classical music, only 7% on those 75+ were not interested.<sup>32</sup> So although there are a greater percentage of younger people who are interested in attending concerts, there is also a similarly large group of younger people who are not. This decreases with age but does not seem to add to the number of

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<sup>31</sup> *Ibid.*, p. A-142.

<sup>32</sup> *Ibid.*

## Data, Data, Data

those who are interested. However, it should be noted that it is difficult to compare interest levels and age when one is examining data across different generations.

**Table 4.8**

AGE	POTENTIAL AS A CLASSICAL MUSIC CONSUMER
18-34	33%
35-44	20%
45-54	18%
55-64	16%
65-74	9%
75+	5%

The presence of children also seems to be correlated with whether an individual will subscribe or remain a single-ticket buyer. Among current subscribers, only 12% had children in the household with only 6% having children under the age of 6 at home. Among single ticket buyers, on the other hand, 23% had children at home, and 13% had children under the age of 6.<sup>33</sup> This seems to show that children may be an inhibitor to concert attendance. It is also interesting to note that despite common belief, it is difficult to transform single-ticket buyers into subscribers. In another survey question in this study, single ticket buyers only had a 4.7 inclination to subscribe on a 0-10 scale (0 being “not inclined at all”, and 10 being “extremely inclined.”)<sup>34</sup>

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<sup>33</sup> *Ibid*, p. A-140.

<sup>34</sup> *Ibid*, p. A-104.

## Data, Data, Data

I also reexamined the data from the Knight Foundation study dataset. The results are slightly different from that of the Knight report and fit in with the family life cycle hypothesis. Among the data collected from the National Survey, for example, attendance among the age groups was pretty level. 20.9% of the 55-64 cohort reported attending a classical music concert in the last 12 months. This was followed by the 18-34 group with 18.3%, 65-74 at 17.5%, 45-54 at 16.5%, 75+ at 13.7%, and 35-44 at 13.5% (Table 4.9).<sup>35</sup>

**Table 4.9**

AGE	ATTENDANCE OF CLASSICAL MUSIC CONCERT IN LAST 12 MONTHS
55-64	20.9%
18-34	18.3%
65-74	17.5%
45-54	16.5%
75+	13.7%
35-44	13.5%

Data for those who attended the symphony in the last 12 months is a bit different, but comparable. Interestingly enough, the youngest cohort 18-34 had the highest percentage of attendance at 24%, followed by 45-54 at 22.4%, 55-64 at 21.6%, 35-44 at 21.5%, 75+ at 21.1%, and 65-74 at 19.6% (Table 4.10).<sup>36</sup> However, these differences

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<sup>35</sup> Firestone Library Data Lab at Princeton University with Knight Foundation dataset

<sup>36</sup> *Ibid.*

### Data, Data, Data

across age groups are small. Age perhaps is a smaller determinant of concert attendance than other factors such as education or socioeconomic status, or even race and gender.

**Table 4.10**

AGE	ATTENDANCE OF SYMPHONY CONCERT IN LAST 12 MONTHS
18-34	24%
45-54	22.4%
55-64	21.6%
35-44	21.5%
75+	21.1%
65-74	19.6%

Among respondents to the 15 market telephone survey, data were a bit different. Those aged 55-64 had attended a classical music concert the most frequently in the last 12 months at 27.02%. This was followed by the 45-54 age group at 26.45%, 65-74 at 22.94%, 25-44 at 21.94%, 18-34 at 20.72%, and 75+ at 19.62% (Table 4.11).<sup>37</sup> Again the percentages are quite close, displaying again the relative unimportance of age as a predictor of concert attendance.

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<sup>37</sup> *Ibid.*

## Data, Data, Data

**Table 4.11**

AGE	ATTENDANCE OF CLASSICAL MUSIC CONCERT IN LAST 12 MONTHS
55-64	27.02%
45-54	26.45%
65-74	22.94%
25-44	21.94%
18-34	20.74%
75+	19.62%

From the ticket buyer survey, a chart was concocted to show attendance history of symphony concerts based on age. More young people attended once in the past year than any other group. However more older people attended more frequently. Thus the skewing of data from the NEA and other organizations showing a “graying” of the orchestra may actually be due more to the greater frequency of attendance among older concert-goers. Whereas 27% of those 18-34 attended once in the past year, only 7.6% of those 65-74 did so. However 78.6% of those 65-74 attended at least two times in the past year, whereas only 51.7% of those 18-34 did so.<sup>38</sup> This data shows that more “different” young people are attending the symphony less frequently, whereas older concert-goers attend more frequently, but that perhaps it is more of the same people doing so.

Another survey question dealt with the level of knowledge of respondents. Current subscribers held the highest percentage of those who were “very knowledgeable” about classical music at 23%. Single ticket buyers had a slightly lower percentage of

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<sup>38</sup> *Ibid.*

## Data, Data, Data

those who were “very knowledgeable” at 17%. 60% of current subscribers were “somewhat knowledgeable” and 16% were “not very knowledgeable.” 56% of single ticket buyers were “somewhat knowledgeable” and 27% were “not very knowledgeable.”<sup>39</sup> This difference may be due to a higher number of fringe buyers in the single ticket group. Ticket buyers are still, on the whole, much more knowledgeable about classical music than the potential classical music consumer. Only 6% of this group were “very knowledgeable,” while 45% were “somewhat knowledgeable” and 49% “not very knowledgeable (Table 4.12).”<sup>40</sup>

### LEVEL OF KNOWLEDGE OF CLASSICAL MUSIC

**Table 4.12**

	Very	Somewhat	Not very
Subscribers	23%	60%	16%
Single Ticket Buyers	17%	56%	27%
Potential Audience	6%	45%	49%

Current subscribers were also most interested in learning more about classical music. 38% of respondents were “very interested” in learning more, 54% were “somewhat interested” and only 8% were “not very interested.” Single ticket buyers were somewhat less interested with 30% who were “very interested,” 57% who were “somewhat interested,” and 13% who were “not very interested.” The potential music consumer was the least interested in learning more but the majority of respondents

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<sup>39</sup> *Ibid*, p. A-108.

<sup>40</sup> *Ibid*.

## Data, Data, Data

showed at least some interest. 14% were “very interested,” 51% were “somewhat interested,” and “34% were “not very interested (Table 4.13).”<sup>41</sup>

**Table 4.13**

### INTEREST IN LEARNING MORE ABOUT CLASSICAL MUSIC

	Very Interested	Somewhat Interested	Not very Interested
Subscribers	38%	54%	8%
Single Ticket Buyers	30%	57%	13%
Potential Audience	14%	51%	34%

Current subscribers were likewise the most critical listeners compared to single ticket buyers and the potential classical music consumer. 42% of current subscribers called themselves “critical listeners,” 57% called themselves “casual listeners,” and only 1% was self-reported as “uninterested listeners.” 28% of single ticket buyers were “critical listeners,” 68% were “casual listeners,” and only 4% “uninterested listeners.”<sup>42</sup> This difference between the two groups is again most likely due to the larger number of fringe buyers in the single ticket buyers group, who are, on the whole, less educated musically than subscribers are. Subscribers are also older and have had more time to learn to listen to music more critically. They also most likely grew up in a time when music education was viewed with greater importance and classical music played a greater role in American society. The majority of the potential classical music consumer is a “casual listener” at 76%. Only 11% are “critical listeners;” however that shows that there

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<sup>41</sup> *Ibid*, p. A-109.

<sup>42</sup> *Ibid*, p. A-112.

### Data, Data, Data

are educated listeners in the population who are not attending concerts for some reason. Only 13% of the potential audience reported themselves as “uninterested listeners (Table 4.14).”<sup>43</sup> The difference in musical performance education between subscribers and single ticket buyers is not that drastic. 74.0% of subscribers sing or play a musical instrument whereas 71.1% of single ticket buyers did so.<sup>44</sup> This shows a rather high correlation between being a musical performer and attending symphony concerts.

**Table 4.14**

#### LISTENER TYPE

	Critical Listener	Casual Listener	Uninterested Listener
Subscribers	42%	57%	1%
Single Ticket Buyers	28%	68%	4%
Potential Audience	11%	76%	13%

What is interesting is the varying response between current subscribers, single ticket buyers, and the potential music consumers to classical music compositions written by contemporary composers. Current subscribers were the most conservative in this respect, with 29% reporting that they would attend the symphony less often if more contemporary pieces were programmed. Only 6% would attend more often, and 66% would attend about as often as they do now. Among single ticket buyers, 23% would attend less often and 14% would attend more often, with 64% attending about as often. The slightly greater interest in contemporary works may be due to the younger

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<sup>43</sup> *Ibid.*

<sup>44</sup> *Ibid.*, p. A-164.

## Data, Data, Data

demographic of single ticket buyers. What is more compelling is the greater interest among potential classical music customers for contemporary music. Only 12% would attend less often and 21% would attend more often, with 68% which would attend as often as they do now (Table 4.15).<sup>45</sup> This may perhaps be a sign that programming newer music may help attract potential audience members that are refraining from attending concerts.

**Table 4.15**

### EFFECT OF CONTEMPORARY MUSIC ON ATTENDANCE

	Would attend less	Would attend more	Would attend same
Subscribers	29%	6%	66%
Single Ticket Buyers	23%	14%	64%
Potential Audience	12%	21%	68%

## 4.4. Concluding Remarks

Based on the data analyzed in this chapter, I have concluded that age is not a significant determinant of orchestra attendance. The attendance percentage differences between age groups are not drastic and vary from study to study and data set to data set. Overall, those aged 45-74 tend to attend concerts more than those 18-44. Those that are aged 18-44, in turn, tend to attend concerts more than those over the age of 75. However these are just bulk numbers. They do *not* take into account the *frequency* of attendance.

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<sup>45</sup> *Ibid*, p. A-136.

## Data, Data, Data

Data show that more *different* young people are attending concerts than older people. In other words, despite the fact that young people might be purchasing less tickets as a whole, a wider range of people are attending less concerts each. Older concert-goers might encompass a narrower range of people who are purchasing more tickets each. Thus, more younger people might actually be attending concerts than their older counterparts. However, in general, age differences in attendance are relatively level across the board.

Another important point is that attendance at concerts does not necessarily correlate with interest in attending. Interest in classical music has grown slightly in the past years. More younger people than older also have potential as a classical music consumer. Subscribers tend to be older and single ticket buyers younger, which may be evidence of a marketing structure which may be keeping younger people who are interested in attending concerts from attending. Another inhibitor to attendance for younger people is families and children, based on the family life cycle theory. From the data, children have been shown to be a major inhibitor to concert attendance.

Another interesting point is that although subscribers are more knowledgeable about classical music, more critical listeners, and more interested in learning more about the music than single ticket buyers and potential consumers respectively, potential audiences responded the most positively to works by contemporary composers. More of the potential consumer group than single ticket buyers and subscribers (in that order) cited that they would attend more often if modern works were featured in a performance. This may be a sign that attracting the classical music lovers who are not attending concerts may partly hinge on the performance of more new works.

## **Data, Data, Data**

In sum, based on the data presented in this chapter, the American symphony orchestra is far from dying. In fact, if the data from the ASOL is correct, revenue from symphonies has risen 33% in the last 10 years and although attendance may have decreased 2.6% (which is not all that significant) in the last 10 years, more different people are buying these tickets, meaning that the orchestral audience is renewing itself and actually broadening. More different people are being exposed to symphonic music and attending concerts. Age is not a significant predictor of attendance although younger people are attending slightly less often than older ones. However this is not due to less interest in attendance but secondary factors which are easier to address than raising base interest in the symphony. I will address this in more depth in the next chapter.

# Chapter 5

## Renewable Audiences

### Summary of Findings

From my research for this thesis, I have come to four main findings on American symphony orchestra audience development:

1. Age is not a significant determinant of orchestra attendance
2. A policy choice exists between the subscription and single ticket sales
3. Brand marketing and the media are critical to audience development
4. A potential audience, interested in classical music but which nevertheless fails to attend live concerts, does exist

I will now address each of these findings in further detail.

#### **Finding 1: Age is not a significant determinant of orchestra attendance**

Age is not a critical factor in determining audience development. Factors such as income and education levels, race, and sex are better predictors of orchestra attendance than age. From analysis of the data presented in chapter 4, it was seen that percentage differences between age groups differ from study to study, but are relatively level throughout. Overall, although those aged 45-74 attended more than those 18-44 and those

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75+, the younger concert-goers attended less frequently per person. In other words, although they may have filled up fewer single seats, more *different* people may have been attending concerts than the older audience members. Attendance also does not necessarily always correlate with interest in the symphony. Studies have shown that more younger people who do not currently attend concerts have more of an interest in doing so than their older counterparts.

Several inhibitions to concert attendance also exist for younger people. These include money, time, and the availability of tickets. Young people subscribe significantly less than older people do, while attending concerts more frequently with single tickets. This has to do mostly with the lack of flexibility of subscription packages, the need to plan ahead, the greater expense, and the greater time commitment of multiple concerts. The family life cycle theory also suggests that younger people are often in the busiest time of the family life cycle of attempting to balance both careers and family responsibilities. This leaves less time for leisure activities. All of these factors may prevent younger people who are indeed interested in attending the symphony from doing so. It is not age, per se, or belonging to a specific generation, which determines the likelihood of attending the symphony, but other factors. As a result, the orchestra is not, in fact, “graying.”

### **Finding 2: A policy choice exists between the subscription and single ticket sales**

A quote from the Knight Foundation sums up the essential dilemma here: “Until orchestras begin to change their dependence on subscriptions, subscription marketing will continue to be the sweet honey that sustains orchestras and a slow-acting poison that

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impedes their long-term stability.”<sup>1</sup> There are many benefits to the subscription system. They bring in the majority of the money that orchestras make from ticket sales, money that comes in “at the front end” and can be invested. Subscriptions are also cheaper and easier to market than single tickets. The system is also very much entrenched in orchestra marketing structures and would be very expensive to overhaul.

However, subscriptions attract mainly an older and wealthier audience. They also tend to discourage younger people from attending due to the lack of flexibility, time, and money addressed in Finding 1. Younger people who would like to hear a symphony concert are much more likely to purchase a single ticket than an older person would. However, by the time they decide to attend, most of the good seats in the house have already been sold to the older and wealthier subscribers and it may be difficult to obtain a seat to a concert. Indeed, the subscription structure may be keeping potential audience members of all ages from attending. Research has shown that most potential audience members have no interest in subscribing to concerts and thus basing a marketing approach on subscriptions will do nothing to attract these people. The problem with single tickets, however, is that they bring in less money than subscriptions and are more difficult to market.

However, even subscribers are subscribing to fewer concerts per year today than they were in the past. After the terrorist attacks of 9/11, orchestras experienced a rise in the number of people who wished to purchase single tickets and a drop in subscriptions. This shows that the entrenchment of the system is mainly on the marketing side rather

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<sup>1</sup> John S. and James L. Knight Foundation, *Classical Music Consumer Segmentation Study: How Americans Relate to Classical Music and Their Local Orchestras* (Southport, CT: Audience Insight LLC, 2002), p. 13.

## Renewable Audiences

than the demand side. Many audience members most likely prefer the flexibility and the greater concert choice which single tickets allow. If orchestras hope to attract younger people and build new and broader audiences, they will need to gradually cut back on subscriptions and switch more of these to single tickets. However, they will lose substantial revenues from subscriptions if it is not done intelligently. They must also be careful not to alienate the core audience.

### **Finding 3: Brand marketing and the media are critical to audience development**

Media attention and brand marketing are important elements of orchestra audience development. According to a study done by the National Arts Journalism Program, classical music is competing for attention in the media not only with other music forms, but with all of mass culture and lifestyle, in addition to the other high arts.<sup>2</sup> But the study also found that the non-profit high arts are able to compete effectively with well-funded mass culture. One example is the local museums and non-profit civic institutions that were able to win “prominent coverage, even in competition with the entertainment industry’s publicity machine” by mastering “the technique of the blockbuster presentation to win prominent coverage.”<sup>3</sup> It is important to note that this competition with mass culture and lifestyle is merely for *attention*. An NEA report showed that entertainments such as TV viewing, sports, and other media, do not appear to inhibit attendance at arts events in any way.<sup>4</sup>

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<sup>2</sup> Michael Janeway, Daniel S. Levy, Andras Szanto, and Andrew Tyndall, *Reporting the Arts: News Coverage of Arts and Culture in America* (New York: Columbia University National Arts Journalism Program, 1999), p. 9.

<sup>3</sup> *Ibid.*

<sup>4</sup> Andreasen, Alan R., *Expanding the Audience for the Performing Arts*, National Endowment of the Arts Research Division Report #24 (Santa Ana, California : Seven Locks Press, 1991), p. 32.

## Renewable Audiences

Media attention is important not only for attention in the news and advertising of concerts and events, but also for changing the brand image of orchestras. Some assume that orchestras and classical music still evoke an aura of snobbery and stodginess. But branding orchestras differently can help alter this image and can target different audience groups with different brand and marketing techniques. Advertisements which portray an orchestra as in step with the times and feature short bios on younger members of the orchestra from time to time, for example, is a means of reaching out to younger potential audience members.

Several other issues contribute to the brand image of an orchestra—nationality of the conductors, crossover programming, and the size and wealth of the orchestra. There are very few American-born conductors leading US orchestras today. Instead, managements tend to favor European conductors, most likely because they evoke a more exotic and old-world feel. However, this may contribute further to the snob feel of concerts and be off-putting to some American audience members. Crossover concerts such as those done by the Brooklyn Philharmonic with groups such as the Mark Morris Dance Company and local art museums also help brand orchestras differently and bring in audience members who enjoy other art forms but may not necessarily have been exposed to the symphony before. Crossover concerts are more effective in smaller organizations, however. And finally, the size of an orchestra should determine how orchestras brand themselves. Large, prestigious groups such as The New York Philharmonic market themselves as such and base their brand image on their capacity to feature world-renowned star soloists and guest conductors, while performing the core repertoire to the highest standards. Niche orchestras such as The Brooklyn Philharmonic,

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on the other hand, brand themselves based on the crossover and innovative programs which they feature.

### **Finding 4: A potential audience, interested in classical music but which nevertheless fails to attend live concerts, does exist**

Although I do not believe the potential orchestral audience is as large as the Knight Foundation study attests, a potential audience with interest in the symphony does exist. First, I should clarify why I believe that the potential audience is smaller than the Knight study asserts. The Knight study is based on the fact that interest in classical music takes many forms. Even programming one's cell phone ring to a Bach prelude is said to show interest in classical music. The preponderance of classical music in stores or in TV commercials is also taken as evidence of interest in classical music. However, these serve mainly as a background "noise" or "wallpaper." It is still a rather large leap from this to attending a concert at the Philharmonic.

My research has also shown that more younger than older people are potential concert goers. Younger people and potential audiences in general are more interested in contemporary music as well. More potential audience members than current single ticket buyers and subscribers stated they would attend the symphony more if more contemporary works were featured. This may show that programming more new works may help bring in these prospective concert-goers. Among existing audiences, a higher percentage would attend less but the percentage of people who would attend the same amount is basically the same as potential audiences.

**Policy Recommendations**

- Subscriptions should be reduced gradually but not entirely discarded. Single tickets should be gradually increased to replace these subscription tickets. The emphasis on “gradually” should be stressed. Because the subscription system is so entrenched and orchestra ticket revenues are still largely based on subscriptions, orchestras must be careful to undertake this change in the system gradually over a long period of time. Each orchestra will have a different means of doing this as each has different financial and structural concerns. However it is executed, orchestras must pay more attention to broadening audiences and attracting younger people if they are to remain sustainable into the future by either cutting back on subscriptions or by increasing single tickets. If the number of single tickets available can be increased without reduction of subscriptions, even better.
- Orchestras need to have more bold advertisements in the media, whether in the newspapers, magazines, or new technologies; orchestras must have a stronger presence in the media. Orchestras must also rid themselves of the stodgy and elitist imagery that some may still evoke. Marketing directors should be aware not to alienate traditional audiences and the musicians themselves in so doing, however. It could perhaps be emphasized that the atmosphere can remain formal while losing its more stuffy and snobbish feel. This can be achieved through effective brand imaging and advertising. The orchestra as an institution must also not come across as something out of step

## Renewable Audiences

with the digital age or antiquated. An emphasis on collaborations with composers today and more frequent features of their works in advertisements and the media may help alleviate this problem. It is also important that each orchestra have its own individual personality.

- Listening perception courses and general classical music history courses should be offered by orchestras. These should be paid by those who attend as one would pay to attend a night course at a college in any other subject. This would have the added bonus of bringing in additional revenue to orchestras. The cost of such courses should not be high, however, as this might ward off some who are interested but not willing to pay a significant amount. Many concert-goers and potential audience members say that they would be “somewhat interested” or “very interested” in learning more about the music. The courses would offer a learning opportunity for those who never had a chance to learn about music in school, but who are interested in doing so now in addition to help build a more well-informed audience.
- More data is needed on orchestra audiences. Of all the data available, that on audiences is the most lacking. This is crucial to further research on audience development. Orchestras need to undertake periodic surveys, learn more about their audiences, and have reliable data for arts researchers when they need them. Orchestras should focus their marketing techniques more on demand (audiences) and less on supply.

## Renewable Audiences

### Finale

This thesis has shown that the American symphony orchestra is doing well. Nothing dramatic is happening—audiences seem to be gradually growing or remaining about the same. There is potential for growth, however, and there are steps which orchestras can take to ensure this growth. Age is not a critical element in audience development and there is little evidence that the orchestra is “graying.” More can be done on the education of audiences and on building a more visible and central role of classical music in American society. The American symphony orchestra audience is indeed renewable. Let us take the steps to ensure it remains so. May the music play on.

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## Honor Pledge

This thesis represents my own work in accordance with University Regulations.