

## ASSOCIATION OF BRITISH ORCHESTRAS

**Stop**

### **Re-inventing The Wheel**

A guide to what we already know about developing audiences for Classical Music.

*“I think it’s the fear of not enjoying it as well. It’s an awfully long time to sit there, you see something advertised like the Four Seasons, well everyone knows the famous bit, but that’s only a quarter of it, there’s three quarters of the stuff you’ve never heard before”*

(Infrequent concert attender, Bristol)

Tim Baker

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### **The art of wheel re-invention (updated)**

This guide was first published in 2000 and arose in part out of a frustration at the time and money many arts organisations – not just orchestras – spent on ‘re-inventing wheels’. The research section of this guide alone summarises over 1,000 pages of research, then there are the books, guides and other publications. The case studies included here also barely scratch the surface of good practice and successful initiatives. There have been many more books, articles, presentations and case studies in the intervening years, but short of re-writing the entire thing it has not been possible to include references to them.

It became apparent in the writing of this guide that collectively we already **knew** how to do audience development. Thinking in some areas has moved on, but the principles still apply. And given the additional resources now available there is even less excuse for wheel-reinvention.

This guide never promised to deliver all the answers, but rather to suggest information that is already available and on re-reading it I think it still offers – at the least – a useful starting point to developing audiences for classical music.

### **Who is this book for?**

This book is intended to present a broad range of perspectives, useful information and practical case studies of use to anyone involved in the promotion of live classical music in the UK. However, it will be most useful as a practical tool for marketers – at whatever level – working for orchestras, venues and other promoters.

### **How should it be used?**

This book is intended to present an ‘argument’ about how audiences can be developed for classical music and as such it is hoped that some will benefit from reading it cover to cover.

Being more realistic, it has also been structured in order to allow the ‘casual’ reader to find specific information that might be required in the process of developing an audience development strategy. The ‘Guide to this Guide’ which follows summarises each of the sections for quick reference.

### **Acknowledgments**

This book would not have been possible without the cooperation of the many organisations and individuals who have allowed their research or case studies to be quoted or made contributions and the author wishes to thank all of them for their generosity.

Thanks are also due to the then staff at the Association of British Orchestras: Libby MacNamara, Alex Knight and Fiona Penny, for their support, encouragement and patience, as well as ideas and comments, during the somewhat protracted genesis of this book. Sarah Bedell helped in researching and writing some sections and Heather Maitland checked that it made sense. Thanks are also due to, in no particular order: Vivienne Moore, Karen Cardy, Sarah Gee, Chris Denton, Anne Roberts, Andy Ryans, Andrew Burke, Jan Ford, Jodi Myers, and Debbie Richards.

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## Guide to this guide

### ***Perspectives on Audience Development***

PAGE

There are almost as many definitions of audience development as people working in the field. This book takes what may loosely be described as a ‘marketing’ view of audience development, but as an introduction, this section aims to put audience development in context and briefly explore a wider range of perspectives on the subject.

## **PART ONE – A REVIEW OF RESEARCH**

### ***An overview of the market***

As much as one-third of the adult population has some interest in classical music. This section looks at how they like to listen, what they like to listen to, how many of them attend concerts (around one-third of those with any interest).

The critical finding is that of those who do currently attend (c.12% of the population), the vast majority do so very infrequently – once a year or less often.

The socio-demographic characteristics of concert attenders are examined, as well as levels of cross-over with other art-forms.

The section closes with an attempt to assess the number of potential concert attenders, which may be as high as 12 million.

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## **PART TWO – PLANNING AN AUDIENCE DEVELOPMENT STRATEGY**

The process involved in planning an audience development strategy is well established and this section summarises the nine steps to be followed, outlining approaches to supplementary research, the importance of setting clear objectives, and the seven areas of activity that can be addressed in order to develop audiences.

## **PART THREE – AUDIENCE DEVELOPMENT OBJECTIVES AND STRATEGIES**

Part three identifies a number of common objectives for audience development and, for each, sets out the implications of the research findings presented in part one, suggests approaches and makes observations on appropriate tactics, and illustrates them with comparative case studies of effective campaigns employed by organisations around Britain.	Introducing first-time attenders	61
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## Perspectives on Audience Development

There are almost as many definitions of audience development as people working in the field. Broadly speaking, definitions differ according to the objectives they seek to achieve: whether they focus on the benefit to the individual or for an organisation. What they have in common is the aim of extending and deepening individuals' experience of the arts and, as such, there are a number of common themes for what makes audience development strategies successful. These are explored below.

This book takes what may loosely be described as a 'marketing' view of audience development: getting more people to attend (more) concerts. As such, the following sections set out information, techniques and practical examples that will help organisations do this more effectively. However, as an introduction, this section aims to put audience development in context and briefly explore a wider range of perspectives on the subject.

There could hardly be a more challenging perspective on audience development than the following, presented by Dave O'Donnell of Community Music, railing against the Arts Council of England's [ACE's] Music on Your Doorstep scheme, to which his organisation, which works with a wide range of music, was not allowed to apply:

*The basic premise of audience development, or access, or community outreach, or whatever we want to call it, is patronising and corrupt. It is predicated on the assumption that the public has got it wrong; that if only we could throw enough lottery money at enough orchestras to put enough players into enough inner-city primary schools to play to enough black kids or, even worse, get enough black kids to copy classical composers and call it creativity – if only we could overcome the young people's stubborn refusal to go to concert halls – then we would save them from a life of cultural poverty and justify our salaries.*

*Surely we must get more sophisticated in our thinking. Surely we have to realise that we, the white, university-educated, salaried autocrats, the cultural power brokers, the decision makers, are the ones who need to change. We need to develop some respect for what young people want, some respect for their music.*

*Then, if we are lucky, they will reach out to us, and do us the honour of enriching our lives and involving us in all that power and fun, and perhaps we would see the wonderful sight of teams of working-class youths being funded by the lottery to run outreach programmes for middle-aged arts managers to encourage them to lighten up a bit and join the party.<sup>1</sup>*

Whilst it is unlikely that many people reading this book will agree with him, the essence of what Dave O'Donnell was saying is inescapable for anyone who is serious about developing more, new and different audiences for classical music. If we are to make music accessible and inviting to more people, we must start to think about the world from their perspective.

### **Classical Music in Context**

What do we mean by 'the arts'? Do people working in the subsidised arts sector mean the same thing as people working in, say, the commercial or non-professional sector? What does it mean to the people we call our 'audiences'? Discussion often shows that the term embraces a huge range of cultural activity, undertaken at many levels.

If one pictures cultural activity as a three-dimensional puzzle, we can start to explore what 'the arts' might mean to people, and the various points at which we interact or engage with 'the arts'. This could extend from the colour and types of plants in a garden, the choice of paintings in a living room, attending gallery talks or readings in a library, right up to and including watching and listening to a performance of Pavarotti at the Met or visiting Monet's water lilies. Television home-style programmes now encourage viewers to create their own artworks – floor canvases, wall hangings and pictures. Is this DIY gone mad? Or is it encouraging people to think differently and explore the challenge of creating something?.

Within this overall picture, the subsidised arts are one corner of the jigsaw, and classical concerts just one piece within the corner. The puzzle needs this one piece, but equally, the single piece will never make up the whole picture on its own. The other way of looking at it turns the limitation on its head and classical concerts become potentially interesting to a much wider range of people.

If the subsidised arts sector could develop new partnerships that cross with other aspects of life, we might free up funding, and make an active contribution to wealth creation in this country. Similarly, if we take a wider view of the subsidised arts, we could also see how we can contribute to cultural planning on many levels, and engage with cultural tourism in a more dynamic way.

### ***What is an audience?***

A broad definition of the arts – as a means of communicating the human condition and expressing our creativity – embraces personal participation as well as attending or engaging in some way with the presentation or interpretation of an artist, and suggests a similarly broad definition of an audience, such as: 'people of any age who experience the arts in any way'<sup>2</sup>.

By developing a wide range of participative projects aimed at developing individuals' own creativity, orchestras' education programmes have highlighted the fact that a real, live experience of classical music need not be confined to standard repertoire in a traditional concert setting. The Association of British Orchestras' [ABO's] publication, *Mapping the Field*<sup>3</sup>, took a snapshot of the variety of 'clients' of orchestra education programmes. The main focus of activity (65%) was in primary and secondary schools, but work was undertaken at all levels of education, from pre-school to tertiary, further and adult education, as well as with music students and nascent composers. Orchestras also undertook projects with community groups, the prison and probation services, adults with 'special needs', in residential homes and with the 'general public', e.g. in shopping centres.

However, it may be that when we include all of what education and participative workshops do as audience development, we might be confusing the issue. The Dictionary definition (Longmans) of an audience is altogether more limiting:

- Audience:
- 1a) a formal hearing or interview,
  - 1b) an opportunity of being heard,
  - 2) a group of listeners or spectators.

There is not yet any documentary evidence to prove that participative education projects result in longer-term concert attendance. Indeed, what evidence there is suggests that regardless of what experience of the arts people receive in school, they are more likely to attend arts events as adults if their peer group does so<sup>4</sup>. This point is also raised in the recent publication *Crossing the Line*<sup>5</sup>, in which the authors observe that participative projects do not address the very real need for people to learn the listening skills essential to enjoyment as a member of an audience.

The relationship between participative education work and concert attendance was also one of the subjects of the ACE's consultation for *Orchestral Education Programmes: Intents & Purposes*<sup>6</sup>. One respondent felt that attempts to link education work to concert-going were addressing the issue from the wrong direction and that it was education work that was leading the way in defining how orchestras might relate to people:

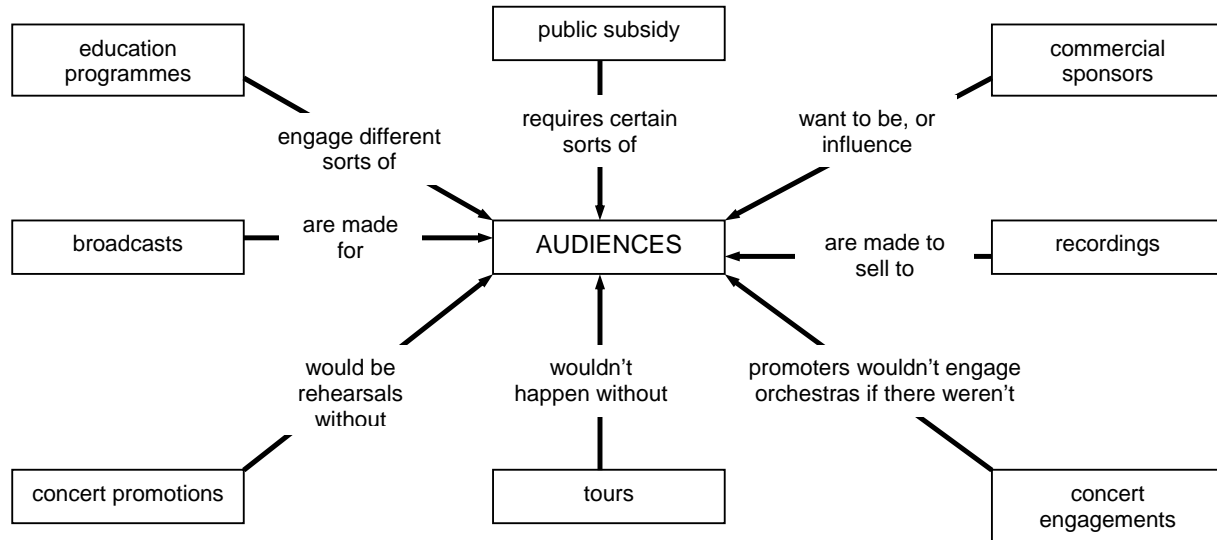
*“On a national basis there is widespread, high quality, innovative and ‘friendly’ education work taking place, working with many groups who are largely not concert goers. Why not? As a student said to me recently, echoing comments that I often hear from groups who I work with, the concert format as it stands is unwelcoming, pompous, dry and staid. She was delighted to take part in education projects but really had no desire to attend the orchestral concert in its current format. There seems to be a real mismatch here!”*

Without doubt, there are many areas of education work which can and do develop people's attendance at concerts, and the enjoyment those people get from the experience. However, by pretending that all such work will create audiences in the concert hall of the future, we may be undervaluing what is a vital experience of the arts for many people. Much of the work is actually about personal development and

creativity and should be valued for its own sake and the tremendous impact it can have on individuals and society.

**Why are audiences important?**

Whatever definition one uses of audiences, they are absolutely central to every aspect of what an orchestra, or ensemble, or concert promoter, does:



There are also two particular issues currently highlighting the priority arts organisations should attach to audiences:

**Accountability**

Arts organisations in receipt of public funding are accountable to their funders, their audiences (existing and potential), their artists and, arguably, to society as a whole.

There is now a greater degree of awareness about public resources than ever before. It must be clear from policies and announcements emerging from the Government via the Department for Culture, Media and Sport [DCMS], and from the new structure and focus of the Arts Councils of England, Scotland and Wales - especially since devolution - that if the subsidised arts sector does not become accountable, and genuinely try to include more people from a wider range of backgrounds, it will pay for its inertia.

What happens if we don't substantially develop our current thinking and practice? It is conceivable that in a new atmosphere of accountability, with focus groups used to test nascent policy, there might be a shift in political attitude. If the feedback was that the subsidised arts didn't offer 'best value', their position on the political agenda might be threatened as money was channelled into other aspects of public life (however much the sector argues that it is a small investment for a huge return). The National Lottery has already had health added to its list of good causes eligible for funding.

**Self-sufficiency**

The boundaries between what a government is expected to organise and provide for people from cradle to grave, and what we are expected to provide for ourselves are changing, as demonstrated by the growth of, for example, private health care; redundancy insurance, mortgage protection, pensions, dental care. It is easy to see the implications for the subsidised arts sector: less disposable income for our existing and potential attenders, and shrinking subsidy from other sources. The public funding system has seen a period of prolonged and painful change with the re-structuring of the Arts Council of England and re-vitalising of the Regional Arts Boards following devolution. There is no doubt that the changes will continue to cascade downwards to all funded arts organisations, regardless of status, income or size.



### ***What is audience development and what can it achieve?***

Notwithstanding the comments on the nature of audiences above, by taking a broader view, and considering how our own contribution completes the puzzle, we can see that we could be using audience development as a means of crossing boundaries between ourselves and other artforms, or other leisure pursuits. This perspective encourages the subsidised arts sector to consider how it can realistically and effectively contribute to modern society in its social and cultural impact.

The Comedia publication, *Use or Ornament*<sup>7</sup> lists no less than fifty ways in which the arts – in the broadest sense and in particular through participative initiatives – can have a positive impact on society, only the last of which is “Provide a unique and deep source of enjoyment”.

In the case of music in particular, there are also detailed arguments presented by the Campaign for Music in the Curriculum in *The Fourth R*<sup>8</sup> about the benefits of music education right across the curriculum.

A broader perspective on the social value of music suggests numerous descriptions of what audience development could be, or what it can achieve:

- enabling everyone to have access to an experience of music and encouraging them to develop and engage with the music;
- developing the potential of individuals to become confident with their creative power as expressed through the arts;
- to engage people as people: finding a way to get people who have never gone to concerts to attend, by focusing on the whole concert experience;
- developing existing audiences by expanding their musical horizons and broadening their musical tastes; and
- making the unknown less scary for audiences - involving people with musical ideas in as informed and connected a way as possible.

In her *Guide to Audience Development*<sup>9</sup>, Heather Maitland identifies three main types of audience development worker. Their roles are paraphrased below:

***Education workers** largely focus on the development of the individual and on the artform as a whole. Their work usually involves participation, although attendance at events may also be involved... The results they want do not necessarily involve the worker’s own organisation but may benefit other arts organisations in the long-term, i.e. “creating the audience of tomorrow”.*

***Artists** tend to focus on improving audiences’ understanding of their work. They wish to bring more people into contact with the work and are often particularly concerned with ensuring the audience has an understanding and appreciation of their artistic aims.*

***Marketers** look for results that directly benefit their arts organisation. They aim to effect a change in the attitudes, understanding and behaviour of both existing audiences and non-attenders. Their aims almost always involve attendance, although this may be in five or even ten years’ time. The projects tend to be carefully targeted at specific groups of people and have clear objectives.*

The perspective of education workers is reflected in *Orchestral Education Programmes: Intentions and Purposes*, where nineteen aims of education projects are listed and summarised under the following headings: ‘music education aims’, ‘non-musical learning aims’, ‘teacher development and support’, ‘curriculum development’, ‘deferment of education aims’ and, identified separately, ‘aims that include a focus on the needs of orchestras’.

Similar categories of ‘purposes’ are identified in *Mapping the Field*. This research found that “orchestras typically describe themselves as a resource for schools and for groups in geographic or social communities”. Most orchestras cite “opportunities for people to participate in the creation of music, with professional musicians”. Assisting teachers in the delivery of the National Curriculum was a high priority and work in schools was seen as an opportunity to familiarise young people with orchestral repertoire and the lives of

musicians. Education projects are also recognised as having a direct marketing benefit: raising the profile of an orchestra locally, providing an alternative for people unwilling or unable to attend concerts, and attracting audiences to orchestral concerts.

The ABO's research also identifies the development of players' skills and creativity as a valid function of education programmes. Artists and performers who are involved in education work or audience development initiatives often find that their communication and presentation skills grow, so that they are more 'in contact' with audiences of all kinds.

Is all of this audience development? Is it significant that both of the research projects quoted above distinguish between the 'needs of the orchestra' (i.e. for concert audiences) and the direct marketing benefit of education projects as separate elements of what an orchestra's education programme might achieve?

The purpose of this section is to provide different perspectives on audience development, rather than attempt hard and fast definitions, and so these questions will be left hanging. However, Heather Maitland suggests how the three perspectives she identifies can be brought together: "All these activities are equally valid. The differences only exist because artists, education workers and marketers approach the concept of audience development from different directions." She goes on to suggest a definition that unifies the different approaches: "Artists, education workers and marketers share a belief that audience development is a planned process which enhances and broadens specific individuals' experiences of the arts."

### ***How do we do Audience Development?***

Whatever the definition of audience development one adopts, there are a number of clear themes apparent in successful projects.

#### **It should be 'audience'-focussed**

The success of any approach to audience development – using any definition of audiences – will rely first and foremost on an understanding of the perspective and needs of the specific audience to be developed.

The potential audience for classical concerts is not homogeneous, and both promoters and funding bodies need to recognise that different people need to be offered different things in different ways. In some cases this means organisations deciding which groups of people they want to 'develop' and planning specific approaches and areas of activity for each (in effect, this already occurs in the targeting of participatory education projects at, for example, 14-17 year olds). In other cases it requires funding bodies to recognise the different needs of different markets and fund specific organisations to address specific groups, rather than expect all organisations to jump through the same set of hoops.

#### **An integrated approach**

The respective roles of education and marketing in delivering audience development are touched on above. Rick Rogers' report, *Audience Development: Collaborations between Education and Marketing*<sup>10</sup> concludes that "effective audience development involves uniting the artistic, educational and marketing elements of the arts organisation to achieve a series of short-, medium- and long-term objectives which increase, broaden and enrich targeted groups."

In broad terms, however, marketing and education are better suited to different elements of audience development. Marketing works best in persuading the 'available' market – those already with an interest – to attend (more) concerts, and aims to do so as cost-effectively as possible, but is far less effective in changing the attitudes and perceptions of the indifferent or even hostile. While education-focused projects have an important role to play in enhancing the experience of those already engaged, they tend to work in smaller numbers and are thus less immediately cost-effective. Where education programmes can really make a difference is with the indifferent or – most politically relevant today – socially or culturally excluded: groups of people for whom marketing approaches are less likely to have an impact.

#### **At the centre of an organisation's planning**

The marketing guru Malcolm MacDonald asserts that marketing is too important to be left to marketers. By the same token, audience development is far too important to be left to marketing and education departments. It must be the concern of all in the organisation, from the back desk of the Second Violins to the Chairman of

the Board, from the Finance Assistant to the Leader. An holistic approach is required which considers the composition and needs of the existing and potential audience from the start and is willing to incorporate that perspective at every stage of planning.

### **Long-term**

As one marketer put it, “short-term audience development project” is a contradiction in terms. Time-limited, short-term or project-based funding and projects, which are too often seen as ad-hoc, are damaging to our credibility with audiences and artists alike, affecting our ability to achieve anything solid. Developing audiences requires a long-term and strategic view. Understanding audiences is a never-ending task, planning cycles are very long, and persuading new and different people to experience more and different classical music in any numbers cannot be achieved overnight. Audience development should be designed to establish an on-going relationship. Creating a single engagement with a group of individuals and then not following that up can actually result in greater alienation than never having contacted them in the first place.

### **The Need for Investment**

In terms of ‘cost per person engaged with’, education projects are not cheap and it is a marketers’ rule of thumb that persuading someone new to attend for the first time is at least five times as expensive as bringing back someone who already attends. There are several successful examples of very ambitious integrated audience development projects in the final section of this book, but all of them involved significant budgets and several were only made possible with specific funding. Audience development needs to be seen as a long-term investment and appropriate resource dedicated to it.

### **Experiment and monitor**

If this investment is made – and it does need to be, both by funding bodies and organisations themselves - there is a role for a ‘laboratory’ of audience development which researches and develops innovative projects, supported by best practice in evaluation, so that we can constantly learn and improve.

### **Working in partnership**

Finally, there is a need for organisations to work together; venues, promoters and orchestras. The task of developing audiences for classical music amongst a wider cross-section of society is much bigger than the resources of individual organisations. The message that is needed to persuade potential audiences is not ‘this orchestra is best’, but ‘classical concerts are great’. We have more to gain from sharing knowledge and experience in order to expand the cake than constantly competing for the same slice.

### ***Focusing perspectives for this book***

For the main part, this guide uses the dictionary definition of audiences, i.e. paid attenders at concerts. It sets out what we know about the people who currently attend concerts and the people we may be able to persuade to attend concerts – their characteristics, attitudes and their behaviour towards classical music.

As the research presented in this guide demonstrates, the number of people with some level of interest in classical music comfortably classifies it as a ‘mass’ market. Nearly one-third of the adult population in the UK professes some level of interest in classical music. Persuading each person currently interested to attend one classical concert each year would produce queues round the block for every concert hall in the country (which is not to say that we wouldn’t need to continue working at stimulating interest among new generations, or expanding the social mix of those interested).

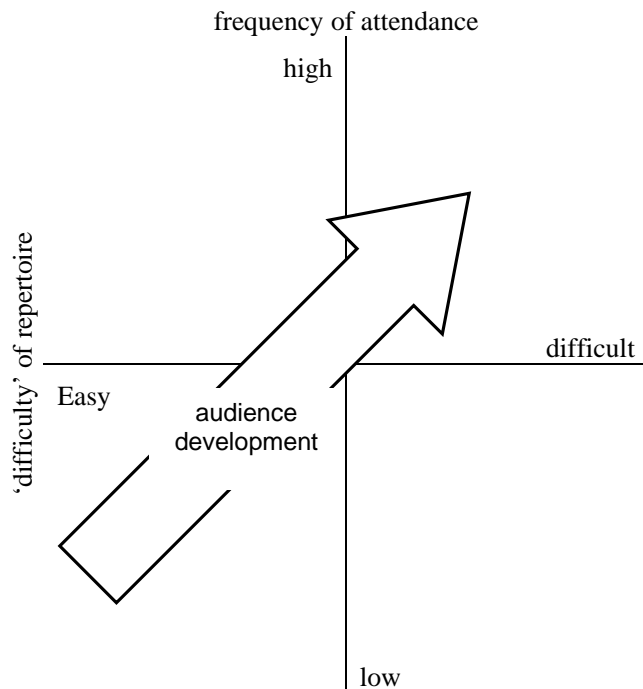
Concerts are, of course, not the only way for people to experience classical music – to be part of an audience. Radio, CDs and other electronic media are preferred by the vast majority of those who enjoy classical music.

For the purpose of concert attendances, audience development for classical music refers to the type, or ‘difficulty’, of repertoire for which audiences are willing to buy tickets and the number of times they will do so.

This means persuading people whose musical diet is currently made up of Bach and Beethoven to extend their menu to include Bartók, and maybe taste some Boulez. It also means persuading people who’ve been

to one concert to come again, persuading people who attended six concerts last year to attend seven next year and, of course, introducing new people to concert-going for the first time.

Given that marketing and education approaches sometimes have such different perspectives on audience development, it is ironic that in many ways education programmes do ‘marketing’ much better than marketers are able to.



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A good education programme will start by talking to its ‘audience’ – be they in a school, old people’s home or prison – to find out what their needs, expectations, and experiences are. It will then – within the scope of the organisation’s own objectives, competences and resources – plan and deliver a programme of experiences that are appropriate to the audience in question.

In the same way, if we are to be serious about developing audiences for concerts, we must constantly work to understand the people we want to ‘develop’ in order to make what we do relevant and attractive to them.

This is not to say that we simply ‘find out what they want and give it to them’ (e.g. Tchaikovsky nights and laser spectaculars, although they have their place). What we can do is take the excellence and artistic integrity of classical music-making in the UK and:

- ‘package’ (i.e. programme) it in ways that are relevant to people at different stages in their ‘development’;
- present it in places and styles that are accessible and attractive to the particular people we want to ‘develop’;
- charge prices that people regard as good value;
- describe it in language that people understand and which motivates them to attend;
- communicate with people using appropriate media;
- make sure that people feel welcome and that every aspect of the experience they have supports their enjoyment of the event and desire to repeat it; and
- evaluate it in useful and measurable ways.

# PART ONE

## A Review of Research

### An Overview of the Market

#### *The market for classical music*

There are a number of ways to define the total ‘market’ – including all the different media available for consumption – for classical music in the U.K. Research undertaken by Classic FM<sup>11</sup> defined their potential market of listeners as anyone who ever:

- listens to Classic FM or Radio 3;
- goes to classical concerts;
- watches classical music on television;
- reads about classical music in the press;
- purchases classical music CDs; or
- plays a musical instrument.

Using this definition, almost exactly one third of the UK adult population enjoys classical music in some form – about 15.7 million people. To put that number in context, the best-selling daily newspaper, *The Sun*, is read by around 3.6 million people, and nearly 400,000 read *The Guardian*. It’s also around 3 million more people than those who watch the soap *Eastenders*.

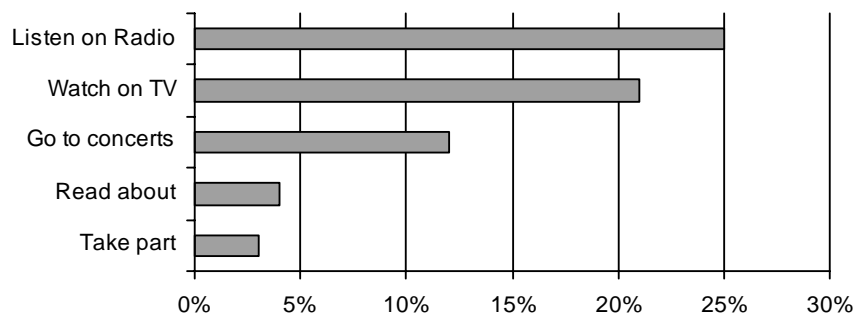
In other words, there is a mass market for classical music and classical music is big business. Classic FM is now a major force in British broadcasting, attracting six million listeners each week.

#### *How do people listen to classical music?*

An Arts Council of Great Britain [ACGB] survey of arts and cultural activities<sup>12</sup> found that 31% of the British population either listened to, viewed or attended classical music, but that the majority (18% of the population) only listened to classical music on the radio or watched it on television.

A survey in 1990<sup>13</sup> put the proportion of the adult population interested in classical music somewhat higher than Classic FM, at 42%, and broke down listening habits as follows:

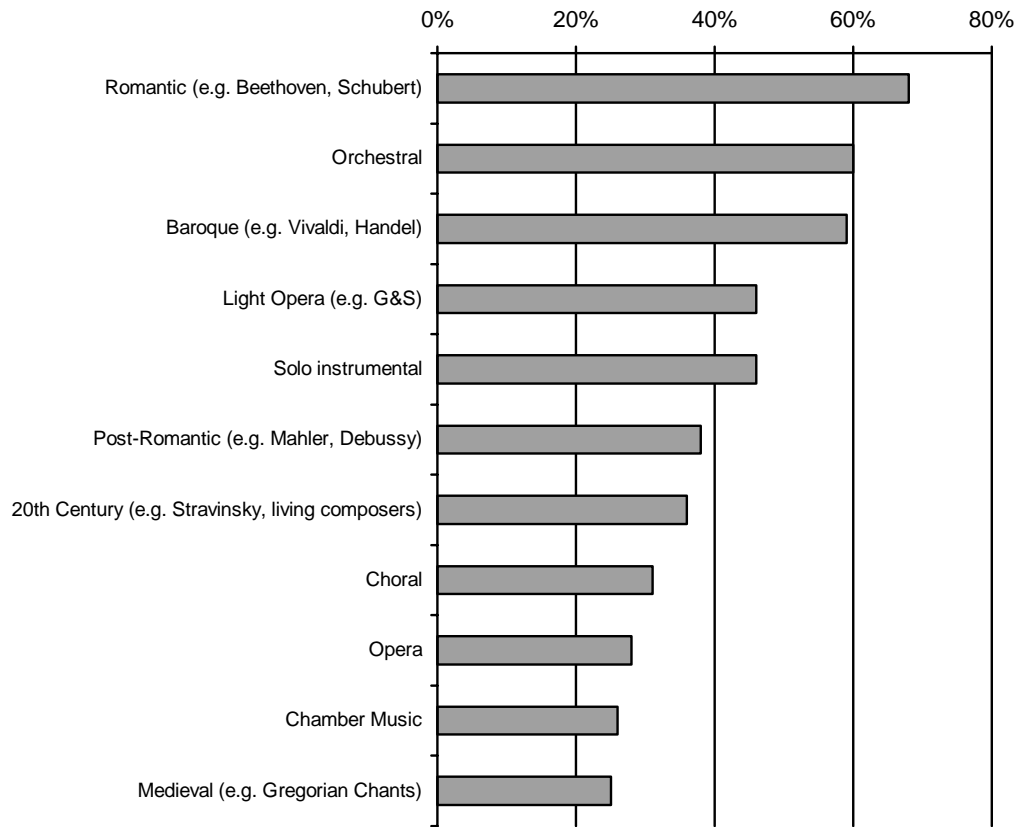
Proportion of the adult population consuming classical music, by medium



SOURCE: Report on a Survey on Arts and Cultural Activities in GB: Omnibus Arts Survey, RSGB (ACGB, 1991)

**What sort of classical music do they like to listen to?**

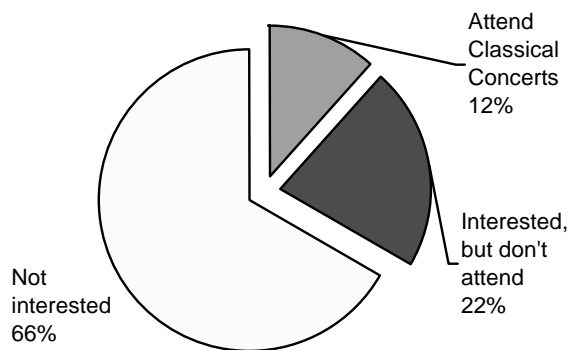
Classic FM’s research asked people within their total market for classical music what their preferred ‘types’ of classical music were within the following categories:



SOURCE: Classic FM Market Research (Classic FM, 1998)

**The market for classical concerts**

Combining recent research<sup>14</sup> with Classic FM’s findings suggests that around a third of those claiming any interest in classical music also claim to go to concerts. The big picture therefore looks something like this:

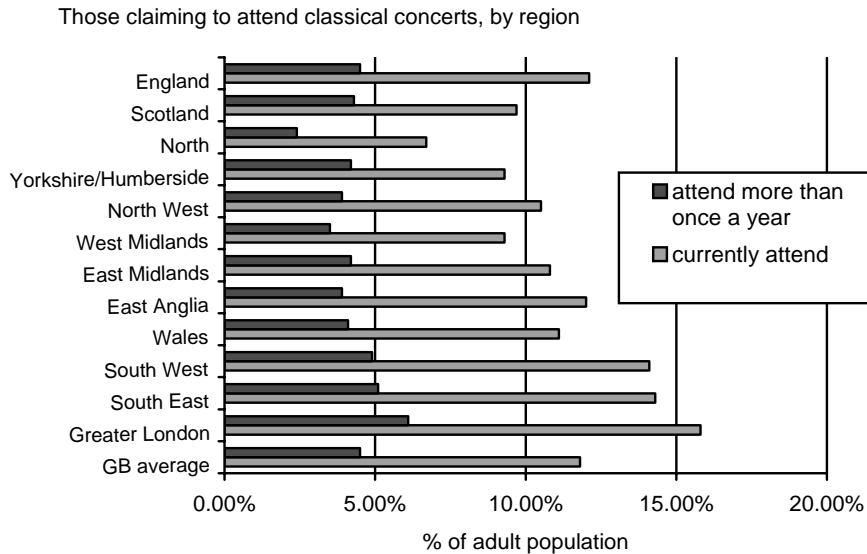


SOURCE: Classic FM Market Research (Classic FM, 1998) / Target Group Index 1997/98, BMRB International, Peter Verwey (Ed.), (ACE, 1998)

The Arts Council (of England [ACE], formerly of Great Britain [ACGB]) has been collecting data on numbers of people claiming to attend various art-forms via the Target Group Index TGI<sup>14</sup> for over ten years. Figures for numbers claiming to attend classical music concerts have been remarkably consistent over that period, with a high of 12.3% in 1988/9 and a low of 11.5% in 1992/3.

**Regional variations**

The data collected for TGI can be broken down by regions and shows some significant variations.



SOURCE: Target Group Index 1997/98, BMRB, Peter Verwey (Ed.), (ACE, 1998)

### ***Frequency of attendance***

As the chart above hints, for someone to count as ‘currently attending’ a classical concert doesn’t necessarily mean doing so very often. TGI figures suggest that on average in Great Britain only 4.5% of the population attends concerts more than once each year. Using the data in the table below it is estimated that the average number of concerts attended by those who currently (i.e. ever) attend is between 2.2 – 3 each year.

The frequency with which people claim to attend classical concerts is the highest for any of the performing arts. For example, using the same formula, the average number of annual attendances for plays is in the range 2.1 – 2.7, Ballet is 1.1 – 1.3, and Opera is 1.6 – 2.

Classical Music Attenders	At least once a month	Every 2-3 months	2 or 3 times a year	Once a year	Less often
% of all adults who attend	0.8%	1.0%	2.7%	3.2%	4.1%
% of attenders who attend	6.8%	8.0%	23.0%	27.4%	34.8%
Estimated number of attendance per annum	12.0	5.0	2.5	1.0	0.3
% of attendances made by those who attend	37.6%	18.5%	26.5%	12.6%	4.8%

SOURCE: Target Group Index 1997/98, BMRB International, Peter Verwey (Ed.), (ACE, 1998)

Anecdotal evidence from orchestras suggests that this research is consistent with the actual behaviour of concert attenders. The implications of this are clear: the vast majority of tickets for classical concerts are bought by a very small number of people and the vast majority of people who attend classical concerts do so very infrequently.



### **Characteristics of concert attenders**

TGI data also gives basic information about the demographic characteristics of people who claim to attend classical concerts. In the table below, the profile by gender, age and social grade is compared to the Great Britain population as a whole and to that of attenders at ‘any eight’ types of arts: plays, ballet, opera and other theatre performances, contemporary dance, jazz and art galleries or exhibitions. The final column compares the profile of classical music attenders to the population as a whole and shows that very slightly more women than men claim to attend concerts and that attenders are more likely to be in the age range 45-64 and of social grade A or B.

Other data in the TGI tables includes the ‘terminal education age’ of arts attenders. Almost 30% of people who left full-time education after the age of 19 claim to attend classical music. This means that people educated beyond formal schooling are nearly three times as likely to attend classical concerts as the population as a whole. Education is the single most significant demographic determinant of whether a person is likely to attend classical concerts.

	GB Population	Attenders at ‘any eight’ arts	Classical music attenders	Classical music index to population
Men	48.6%	44.6%	45.7%	94
Women	51.4%	55.5%	54.3%	106
Age				
15-19	8.4%	7.6%	5.3%	63
20-24	6.6%	6.1%	4.9%	74
25-34	19.4%	19.3%	15.8%	81
35-44	17.5%	19.0%	15.4%	88
45-54	16.2%	18.4%	20.2%	125
55-64	12.2%	13.0%	16.9%	139
65+	19.7%	16.7%	21.5%	109
Social Grade				
AB	20.8%	31.7%	45.9%	221
C1	27.6%	33.5%	33.1%	120
C2	21.9%	17.2%	10.6%	48
DE	29.6%	17.6%	10.5%	35

SOURCE: Target Group Index 1997/98, BMRB International, Peter Verwey (Ed.), (ACE, 1998)

### **Classical concerts in an ‘arts’ context**

The table below (again drawn from TGI data) ‘cross-tabulates’ the number of people who attend a variety of different art-forms with attenders at classical concerts; those who ‘currently attend’ (i.e. ever attend) and those who attend more than once a year. It shows the proportion of classical concert attenders who also attend each other artform and the attenders of each art-form who also attend classical concerts, as well as showing the average for people who attend any one of the eight art-forms.

It will come as no surprise that people who go to opera or ballet performances also go, reasonably frequently, to classical concerts. The finding that people who go to concerts are just as likely to go to a pop or rock concert as to the opera reflects the fact that people do not necessarily see a clear divide between ‘high’ and ‘popular’ culture, but view all forms of culture as an opportunity for a ‘night-out’.

	'Currently Attend'			'Attend more than once a year'	
	% of CM attenders who attend	% of attenders who attend CM	% of 'Any 8' who attend	% of CM attenders who attend	% of attenders who attend CM
Any Theatre performance	77.8%	25.8%	77.8%	56.0%	16.4%
Plays	66.6%	35.1%	49.0%	43.6%	22.1%
Ballet	29.4%	54.6%	13.9%	9.0%	35.5%
Contemporary Dance	18.9%	48.9%	10.0%	4.9%	25.4%
Opera	33.6%	65.1%	13.3%	18.4%	50.5%
Classical Music			25.8%		
Jazz	26.2%	54.3%	12.5%	9.8%	28.1%
Art Galleries/Exhibitions	65.7%	36.9%	45.9%	45.4%	22.1%
Cinema	73.8%	16.0%	70.9%	49.4%	10.5%
Pop/Rock	34.1%	18.7%	35.2%	10.0%	6.7%
Museum in the last 12 months	54.2%		40.6%	59.1%	

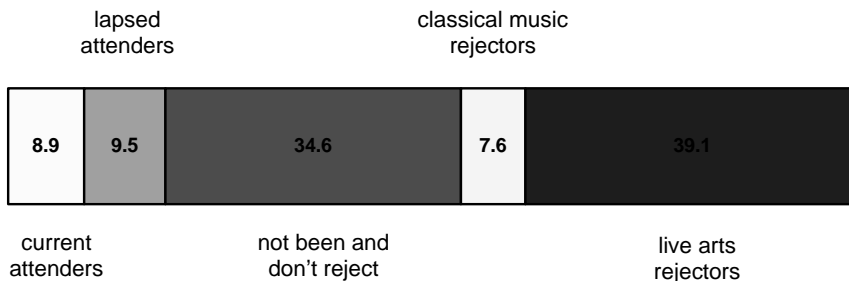
CM = Classical Music

SOURCE: Target Group Index 1997/98, BMRB International, Peter Verwey (Ed.), (ACE, 1998)

**The potential market**

ACGB’s *Classical Music Research Digest*<sup>13</sup> used some of Millward Brown Market Research’s own research, which attempted to quantify the potential market for classical music.

This research, undertaken in 1989, asked different questions to TGI and thus identified the market for concerts differently. Their data sets the number of current attenders lower, but also identifies more than the same number again who had been before but were ‘lapsed’ attenders. Removing those who rejected the notion of attending the live arts at all and classical music in particular, over a third of their sample had not been to a classical concert, but did not reject the idea of doing so.



SOURCE: *Research Digest for the Arts: Classical Music*, Peter Walshe / Millward Brown (ACE, 1992)

Millward Brown also offers a demographic profile of ‘rejectors’ and ‘non-rejectors’. The profile of ‘rejectors’ shows some significant differences from those who don’t reject the idea of attending in that people with young children at home and people between the ages of 15-34 are more likely to reject classical music.

It is very difficult to get a consistent picture of the market for classical concerts, but by using Classic FM’s definition of the total market and the finding of other studies to break it down, it is possible to develop an overview, as in the following table:

<b>Market sector</b>	<b>Notes</b>	<b>Proportion of adult population</b>	<b>Number of people (millions)</b>
Regular attenders	Attend concerts at least once a month.	0.8%	0.4
Frequent attenders	People who attend more than one concert each year, but less than once a month.	3.7%	1.7
Infrequent attenders	Attend concerts once a year or less often.	7.3%	3.4
<b>Total current attenders</b>		<b>11.8%</b>	<b>5.4</b>
Lapsed attenders	People who have experienced classical concerts, but not returned, or used to attend but have stopped doing so.	c. 7%	3.2
Interested and would consider attending.	Consume classical music, attend other arts events, don’t attend classical concerts but don’t reject the idea.	c.12%	5.5
<b>Total potential attenders</b>		<b>c.19%</b>	<b>8.7</b>
Interested but wouldn’t consider attending	Consume classical music but either can’t or don’t want to attend.	c.4%	1.8
<b>Total market</b>		<b>34.8%</b>	<b>15.7</b>

Of course, there may be others among the two-thirds of the population who don’t currently consume classical music who might be converted on the spot into regular attenders. However, on this basis, the latent potential market for classical concerts already existing in Great Britain may be as many as 8.7 million people. By adding those who attend concerts once a year or less often, the number of people who already enjoy classical music and might be persuaded to attend (more) concerts may be as high as 12.1 million.

## Understanding the market through segmentation

One of the most important concepts in audience development is ‘targeting’: deciding who it is you want to ‘develop’ and then creating a mix of activities appropriate to each target group. In essence, talking to the right people about the right things in the right way. This approach is discussed in Part Two (including an outline of the seven areas of activity we should seek to ‘target’).

‘Segmentation’ helps to break down a ‘market’ into groups with similar characteristics – in this case, similar attitudes and behaviour towards classical music listening and concert-going – in order to target areas of activity more effectively.

A number of the research projects referred to in this guide have used their findings to identify different groups and, by analysing their differing characteristics, attitudes and behaviour, suggest particular approaches that might develop their consumption patterns.

Three such market segmentations are included below, from research by Classic FM<sup>11</sup>, Harris Research<sup>15</sup> (for ACE) and the South Bank Centre [SBC]<sup>16</sup>. Each uses a different methodology and describes a different ‘universe’ (respectively, the ‘whole’ market, potential attenders, and current attenders), but there are striking similarities in the attitudes and behaviours towards classical music that they describe.

Although many organisations will not have the resources required to invest in the sort of research used to describe these market segments, experience suggests that the characteristics outlined below will hold true for most classical music audiences. In particular, the commitment displayed by the relatively small ‘core’ of regular attenders and, by contrast, the low level of engagement with classical music exhibited by potential attenders. By undertaking analysis of the customer records held on a box office computer it is possible for any organisation (assuming they have access to box office records) to identify different groups according to – principally – their frequency of attendance and, tentatively, to impute to them some of the characteristics of the market segments described here.

As a ‘quick reference’, the table below attempts to show how the various market segments derived from the three different research projects might fit against the frequency with which people attend concerts.

	Frequent Attenders	Infrequent Attenders	Potential / Non-Attenders
Classic FM	Aficionados Populists Hooked on Classics Companion Listeners Newcomers*		
Harris Research (ACE)	Committed Listeners Active Listeners Light Listeners*		
South Bank	Conservative Fanatics New Modernists Mainstream Stalwarts Good-time Novices		

\* A significant number of ‘Newcomers’ and ‘Light Listeners’ will probably not even be potential attenders given their very low level of interest in, and knowledge of, classical music.

## **Classic FM**

As described on page 15, Classic FM's research defines the total current market for classical music very widely, encompassing a third of the adult British population. The quantitative element of their research is based on the same TGI data used by the Arts Council of England and so we can be reasonably confident that around one-third of the people described below ever go to classical concerts.

On the basis of this research, Classic FM decided that 'Populists', 'Hooked on Classics' and 'Companion Listeners' represented the best potential for increasing listenership and adjusted their output and promotion to reflect their particular needs, focussing on the 'mood-improving' qualities of classical music as an 'antidote' to modern life: relaxing, uplifting, moving and passionate.

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### **Aficionados**

"Committed and passionate"

61% of Aficionados ever go to concerts

- Collectors of classical music information and recordings
- Feel they know about classical music
- Mainly listen to classical music on CDs and cassettes
- Listen to the whole works as opposed to snippets

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### **Populists**

"Tell me more about Classical Music"

48% of Popular Enthusiasts ever go to concerts

- Amateur classical music enthusiasts
- They own classical CDs and want to build a collection
- They also listen to the golden oldies, easy listening
- Go to the theatre and like musicals

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### **Hooked on Classics**

"Stick to what I know"

28% of Hooked on Classics ever go to concerts

- When buying any music tend to stick to what they know
- Conservative tastes
- Don't know where to start to learn more
- Tend to collect compilation CDs
- Comforted by famous names

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### **Companion Listeners**

"It's nice background listening while I work"

31% of Companion Listeners ever go to concerts

- Reasonably keen on classical music
- Like the popular classics
- Prefer compilation albums
- Listen to the radio
- Recognise the classics but usually can't remember the name
- Listen to chart music and jazz

## **Infrequent and non-attenders**

The Harris Research Centre<sup>15</sup> undertook a total of ten group discussions for ACE, eight with 'non-attenders' (defined as having attended classical music concerts given by orchestras no more than once in the last year, but who made a point of listening to orchestral music on radio, TV, CDs etc.) and two with 'attenders' (recruited from concert-goers who had attended four or more orchestral concerts in the last year).

This research identified three groups of 'potential' attenders according to their listening habits and suggested that this behaviour represents different attitudes to classical music which, in turn, determined their likelihood to attend classical concerts and the barriers to them doing so.

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### Committed Listeners

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Mainly older with an extensive repertoire of classical music. Regular concert attenders.

Classical music is a devoted activity, requiring total involvement: *“I think classical music’s quite a personal thing. I don’t think you share it like I do my other music. I tend to go into myself with classical music.”*

Sophisticated listeners, find some CDs too perfect, too manufactured. Live transmission/recordings are enjoyed – imperfections a positive element – highlights uniqueness of performance.

Like to plan listening, either for evening’s entertainment, or to tape:

*“I certainly listen more to my own records and tapes. But then, I always look at Radio 3 to see what’s on, and if it doesn’t clash with something else, I tape or listen to it”*

TV coverage of concerts can be distracting: *“It’s not a visual thing”*

### Active Listeners

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Mixed age groups. Tend to be non/passive concert attenders.

Use classical music for displacement listening: *“I tend to iron to pop music, I like it loud and rocky to iron, but when I’m doing quiet things I use classical music.”* and *“At home I sit with my earphones on and read.”* But they are developing a more committed attitude: *“You have to sit and listen to classical music, you’ve got to have time to sit and listen to it.”*

Domestic listening appeals for freedom of choice: *“I prefer to listen to music I’ve actually gone out and bought”*. They also tape personal recordings from the radio.

Listen to Classic FM, Radio 4 and some Radio 3. Like radio for element of surprise and ability to add to repertoire:

*“I’ve heard pieces of music I’ve never heard before and enjoyed them”*

*“.. if you want to discover new pieces of music, I think you’ve got more of a chance of doing that on Classic FM”*

Keen to enlarge repertoire. Use radio to broaden knowledge & stimulate purchase (of CDs): *“If we didn’t listen to the radio we’d never learn”*

### Light Listener

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Younger, enjoy popular classics and modern music, usually as a displacement activity. Tend not to be concert attenders.

They have a flirtatious relationship with classical music, tuning in as readily to Radio 1.

*“If we have a dinner party we choose light things that are general for everybody, like Genesis, depending on who’s there. But if I’m listening at home I put Classic FM on”*

Listening as displacement activity (driving/reading/household chores):

*“I often listen and do the ironing”*

Domestic listening appeals because of instant accessibility and freedom to select.

Generally prefers Classic FM & Radio 4. They don’t plan listening – just tune in to whatever’s on.

TV acts as a visual aid to music – viewing artistic interpretation and physical expression:

*“I sometimes am fascinated by the way people play their instruments”*

Also like information support.

Mainly non-concert attenders, at most passive: *“Most of the concerts I’ve ever been to I’ve actually been invited to and it’s been the invitation that has taken me there.”*

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## **Concert-goers**

CRAM Research<sup>16</sup>, for the South Bank Centre [SBC], undertook group discussions with ‘attenders’ from the SBC database (all of whom had attended SBC at least three times in the previous year, as well as a ‘competitor’ venue). They identified four broad groupings of attenders which they were able to relate, on the basis of attendance patterns, to numbers of people on their database.

By using this segmentation to offer appropriate concerts packaged in a relevant way to each of them, SBC has achieved record attendances at the Royal Festival Hall. A case study showing how they used this information is included on page 73.

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### **Conservative Fanatics**

(c. 4% of SBC attenders)

Older (50+), male, self-confessed ‘connoisseurs’. Traditionalist enthusiasts.

Part of an exclusive club with deep reverence for, especially, 19<sup>th</sup> Century and earlier classical music.

Artists and repertoire are critical to decision to attend – venue secondary.

Complete addicts – they go as often as they can afford (more than weekly).

Concerts are chosen for a specific programme, conductor, soloist or orchestra (or combination).

They have an ongoing quest for peak experience – to hear a profoundly stirring performance or be surprised by the unexpected.

They want to broaden their knowledge/repertoire and experience further interpretations of known works.

They are concerned with authenticity and purity in classical music. They like exclusivity, stability, order, integrity and are threatened by change. Willing to build a relationship with an ensemble.

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### **Mainstream Stalwarts**

(c. 35% of SBC attenders)

Broad age-range (30+), genders mixed.

Classical Music plays an important role in their everyday lives.

They have narrow but discernible tastes: “*I know what I like*”. They seek the familiar and are wary of experimentation. Want uplifting experiences, touched by emotion, taken out of everyday routine.

They have an emphasis on the whole experience. Venue and facilities are very important to them. They like to know their way around.

They are frequent concert-goers (20+ concerts a year). Primary motivator in concert attendance is a known/loved work – safety. New works are forced by programming rather than choice. Reputable artists are also an important influence. Programming preferences are focused in a narrow spectrum – i.e. one historical period.

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### **Good-Time Novices**

(c. 60% of SBC attenders)

Broad age-range, biased to younger, mixed gender, occasional concert-goers

Concert-going part of leisure activities. The arts & classical music are associated with recreation, relaxation, socialising – an antidote to everyday life.

Seek a shared social experience.

Concerts are chosen on the basis of big names or popular composers.

They are seeking the total experience – atmosphere, drinks, meal, people-watching.

Venue critical – music programme usually little known.

**New Modernists**

(c. 1% of SBC attendees)

Younger (25-50), mixed gender, go to concerts of 20<sup>th</sup> Century music.

Have an intense involvement with contemporary classical music. They are open minded, experimental – risk-taking. They seek challenge, confrontation and the unusual.

They are interested in contemporary art as a whole and see it as pioneering new social values. They have a certain contempt for traditional classical music.

They are seeking intimacy and involvement. Freshness/newness – a sense of discovery.

Concerts chosen by a mix of artists and repertoire. The presence of a composer is a major draw.



## Concert-going

According to the famous advertising adage, what sells is the ‘sizzle’ not the ‘sausage’. Most advertising for classical concerts goes no further than describing the ‘sausage’ – what works are to be performed, who the conductor and orchestra are – rather than expressing the benefits that people will feel from their experience of that concert. Anybody involved in classical music knows that music can express profound feelings, but we often forget that those who are less involved – our potential audience – might need to be told about these benefits.

### **The power of music**

A study prepared for the South Bank Centre [SBC]<sup>16</sup>, prefaces its conclusions with a summary of academic thought on the effect that music has on people:

*Music plays an important part in the lives of most of us, providing us with pleasure, emotional solace and inspiration. Music even features prominently among people’s primary values: alongside family and sex, and usually above religion, sport, and travel (Cameron and Fleming, 1975)*

*Music has the power to give pleasure in a manner parallel to euphoriant drugs – endorphin-release may be involved in the experience of thrills obtained from music (Goldstein, 1980)*

*Music is like a religious experience in its power to create ecstasy and intoxication, and occasionally transcendental effects. Music may transport us by creating mystical feelings of union, oneness (Nadel, 1971)*

*Basic psycho-biological processes are involved in music. Faster and louder music has been shown to increase hear-rate and hence induce a feeling of excitement. Repetitive rhythm can induce trance-like states in such a way as to produce changes in brain chemistry – hence music is use in connection with religious rituals, sex orgies and war dances (Rouget, 1985)*

*A certain background or experience is usually necessary for full enjoyment of a musical work, and in this sense it has parallels to language learning (Jackendorff and Lehrdahl, 1982)*

*Personality factors affect enjoyment of particular forms and types of music. Extroverts prefer strong rhythms, fast tempi, discordant harmonies and ‘joyful but agitated mood’. Introverts prefer music with formal structure (e.g. Payne, 1980)*

*Live music has more influence on listener responses than recorded music. People who hear live music performances develop more positive attitudes than those who hear recorded music (Vaughan, 1983).*

#### *Levels of Association*

*An important way in which music engages the emotions is through associations with other sounds or ideas that are emotive:*

- *at the most basic, primitive level, music has the power to engage our emotions by simulation of sounds from our environment that have instinctive interest for us (e.g. thunder, cries of anguish, excited heartbeats);*
- *music gains effect by its association with metaphorical (usually spatial or visual) representation. The richness of human metaphorical thinking is one source of our appreciation of music;*
- *the emotional appeal of music is also associated with nostalgia, and the evocation of pleasurable or painful memories;*
- *physical experiences are associated with music – shivers down the spine, laughter, tears, and lumps in the throat;*
- *the theory of Optimal Uncertainty (Berlyne, 1971) goes some way to explain musical appreciation. According to this idea, a pattern of notes or chords that is totally predictable will be dull and uninteresting, and one that is totally unpredictable will also be boring (and possibly disturbing/intrusive). Musical pleasure is gained at the intermediate point where our brain is engaged*

*in discovering structure and generating hypotheses about what sounds will occur next, but is not yet overtaxed.*

Clearly the enjoyment of music depends upon many diverse factors:

- some are a natural consequence of the physics of sound and the characteristics of our acoustic processing system;
- some are inherent in our instinctive make-up and personality; and
- others depend upon learning, experience and conditions prevailing in the social environment.

**Why do people go to concerts?**

Staying with SBC’s research, CRAM identify five types of ‘need’ or motivation that might be satisfied by attending concerts:

Ideals	Mystical union with the infinite/eternal Enhanced consciousness Magic/enchantment Transformation/transcendence Harmony of mind & body
Emotional Needs	Unwind/relax Stimulation/excitement Escape/fantasy Catharsis/release (“thrill”, “frisson”) Intensity/intimacy/passion
Personal Needs	Education/expansion/nostalgia Nourishment Trial/experimentation/discovery/challenge Broadening repertoire
Social Needs	Interaction/sharing/contact Communion with players/audience Rituals: ‘dressing up’, display (and informality, comfort) Sense of humanity: ‘live feel’ Entertainment: ‘a good night out’
Basic Needs	Relief from routines, everyday life stresses New experience, change Sustenance, refreshment Human warmth.

In practice, and as other research demonstrates, different people attend concerts for different combinations of these reasons.

CRAM observes clear commonalities between different groups of concert-goers but with a different ‘accent’ according to how often they attend. Regular, committed attenders place greater emphasis on personal and emotional needs and an active engagement with the live performance. The same needs are realised for occasional and first-time attenders, but they attend primarily for relaxation and enjoyment – fulfilling more basic, social needs. This research relates closely to a five-stage ‘hierarchy of human needs’ developed in the 1950s by the psychologist, Maslow, which is discussed in *Standing Room Only* (Chapter 4)<sup>17</sup>.

This observation is borne out in the *Research Digest*<sup>18</sup> in research undertaken by Millward Brown. They have created a ‘relative importance index’ of potential attendance factors for current and potential arts attenders in general and summarise the key differences as follows:

Current Attenders	Live performance Discuss with friends More than just entertainment Makes you think That it's in a big theatre
Lapsed attenders	Easy to book Park nearby No booking ahead Makes you think Cheapest seats
Non-attenders	Close to stage Well known performances Dress up Eat That it's in a big theatre Cheapest seats
Rejectors	Fun evening Price of tickets Get a drink Well-known performers

Of course, the reasons people actually choose to attend a performance will be based around the particular performance on offer. What this research does is weight the relative importance of different factors.

For classical music, the *Research Digest* identifies that current attenders think more about the actual event: the composer, the orchestra and the fact that it's live, whereas potential attenders are relatively more concerned with elements outside the auditorium itself, e.g. that they can eat and get a drink there.

The South Bank Centre has used its understanding of different market segments and the different benefits that people seek to develop more effective marketing approaches and one such is illustrated in the case study on page 71.

### ***The benefits of live-ness***

Research commissioned by the Arts Council as long ago as 1985<sup>19</sup> summarises the benefits enjoyed by people attending live arts events.

The research identifies basic differences in the sort of pleasure derived from the live arts, which may be intellectual or emotional and active or passive:

*Intellectual enjoyment, based on an accumulated specialist knowledge of the subject, must necessarily be active because it involves paying close attention to details... in order to 'appreciate' what the performers are trying to achieve – even if it is not especially enjoyable. We find it in relation to drama, opera and music and always amongst either frequent attenders or music students.*

*Emotional enjoyment, especially applicable to art forms which involve music, may be either active (seeking new stimulation, unexpected facets, emotional excitement) or passive (seeking familiarity and relaxation). Those who seek emotional excitement are more likely to respond to unconventional, unfamiliar events, whereas those who wish to find relaxation are more likely to reject unusual or unfamiliar performances as too demanding and unpredictable*

This study also found that many people seek entertainment from the performing arts – a form of escape and relaxation from everyday life.

*"I find (a concert) relaxing. I can unwind with the nice warm atmosphere and the music – particularly if it is something I particularly like. When I was younger I wanted it to be exciting... but now I want it relaxing... the main thing is that it distances you from everyday problems and the material aspects of life."*

An extension of the desire for 'escapism' and 'entertainment' is of the special 'treat' of an evening out:

*For most this involved careful planning, taking time to get dressed up and the excitement of a change of scene, together with the luxury of indulging money on personal enjoyment.*

Radio 3<sup>20</sup> [R3] undertook extensive research with regular concert attenders and listeners to live radio broadcasts in order to understand the benefits that they perceived from a ‘live’ experience of music rather than recordings.

They found that people have a clear set of expectations when going to a concert:

- they expect to give it their full attention and concentration;
- they expect to know at least one of the pieces, or feel in the company of someone or at somewhere they know is reliable;
- they expect it to evoke strong emotions, feelings, moods - not a clinical, analytical experience; and
- they expect to feel an important part of the event itself: there’s no point without an audience.

The R3 research further identified a clear, consistent, strong set of emotions and benefits from attendance. These, and similar findings from research by the Scottish Chamber Orchestra<sup>21</sup> [SCO] and South Bank Centre<sup>16</sup> [SBC] are summarised below.

Uniqueness

- The sense that this only happens once, and happens minute by minute [R3].
- It’s ‘honest’ – there are no retakes. This gives it an incredibly important unpredictability, and sense of the unique [R3].
- Recorded performances can feel too perfect, diminishing the human element. It is the very ‘imbalance’ of a performance with its human imperfections (“warts and all”) that adds to the intensity of a ‘live’ performance and allows the unexpected to enter. [SBC].

The Sound

- The sound was cited as a very important element – a richer, louder, more rounded, warmer, ‘real’ sound [R3].
- ‘Live’ sound feels different to recorded. The senses are highly aware of the variability, range and timbre of the ‘live’ sound experience [SBC].

Emotional Release

- In this ‘cyber’ and ‘virtual’ age, it’s tangible, and real; a wonderful antidote to an age of mass-production [R3].

*“I am uplifted into this extraordinary feeling of oneness, with the knowledge that even in this post-modernist world now, some wonderful things can never be explained away” [SBC]*

- Members of the audience may feel all the exciting physical reactions they usually experience when listening to a beautiful piece of music: prickling sensations on the neck and scalp and shivers up and down the body. It can be a relaxing experience, a time to reflect quietly, far from intrusions. It can be a great emotional experience that leaves one feeling exhilarated and stimulated. [SCO]

*“There are moments in concerts when I literally feel myself tingle all over – when it happens it’s so nice” [SBC]*

- The aftermath, the ‘halo’ effect, the elation of having been part of the event, particularly if the music has invoked strong emotions [R3].

## Participation

- Concert-goers are immersed in personal reactions to the music, but aware of sharing it with other members of the audience and the performers. The knowledge of collective participation heightens sensations and enjoyment. [SCO]
- A sense of participation in the creation of something that will only exist for as long as they're there – almost as if they are 'conspiring' with the musicians to create the event. They like to feel that they are the point of this – the musicians are playing for them [R3].

## Social

- Being in the company of people – which includes 'all-sorts' – who share your interests and passions: a cocoon from the *sturm* and *drang* and variety of the outside world [R3].
- "A deepening of my friendship with this person, as we shared the experience – feeding between us". [SBC]*
- Discussing it with others, coming to views after hearing the music [R3].

## The Occasion

- The occasion itself: making arrangements to have a 'special' time for yourself, indulgence [R3].
- Dressing up and looking good; the hall/ theatre/ venue itself and its architectural merit [R3].
- Particularly in summer, the outdoor venues, with fireworks etc. make for a large party type atmosphere [R3].
- Hush, '*proper*' behaviour, so even when bored, still part of the audience/ event itself [R3].

## Spectacle

- The spectacle of a 'live' event has great visual impact. Viewers can watch the instruments, the musicians' and conductor's movements, which enable them to hear and feel deeper 'layers' of music, changes and patterns, than can ever be picked up on CD. [SBC]
- Watching the conductor create/master/dominate the musicians and admiration of the craftsmanship/skill of the musicians [R3].
- Being part of something important. Knowing names (even if it's only the orchestra or the conductor). [R3]

## Learning

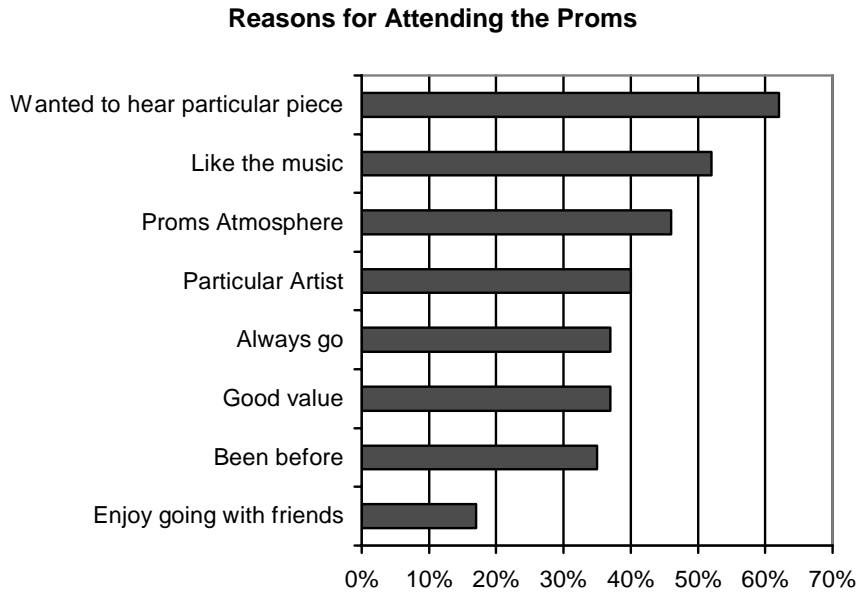
- It carries you into a more open-minded state. For most respondents, there was a hope that they would get to know something new in this context [R3].
- A sense of learning, getting more deeply into the music: you have to listen to the whole piece whatever your at-that-moment feelings. It can be very enlightening to have had to listen and got the sense of the whole piece [R3].
- The balance of a mixed programme: the familiarity that's drawn them there, but with one or two less 'reliable' or mainstream pieces [R3].
- Even the programme, with its background notes, can help 'set up' your listening: that is to say, making your listening analytical, critical. The point of the concert is more to experience than criticise [R3].
- Learn more about the music, composer etc. through the notes, but it's more a 'feeling' that you've got to know the music better, that you're experiencing it, standing back from it and analysing it [R3].

**How do people choose concerts?**

Most orchestras and promoters have at some stage undertaken research asking current attenders about the factors that affect their decision to attend a particular concert.

Even at the BBC Proms<sup>22</sup>, the music, or a particular work, out-scores the Proms themselves as a reason for attending:

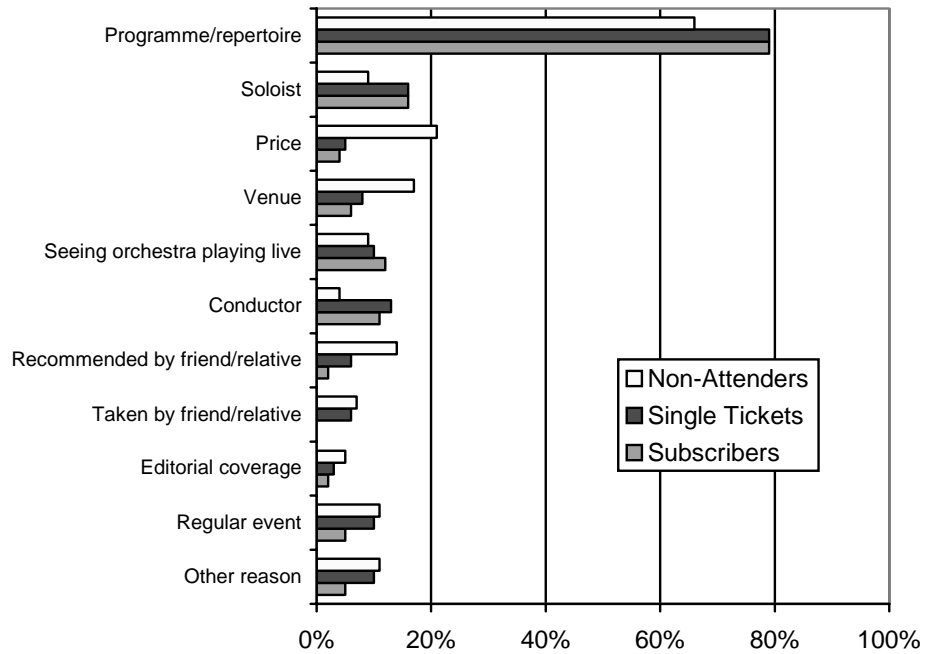
SOURCE: BBC Proms Customer Survey (BBC, 1998)



For the City of Birmingham Symphony Orchestra [CBSO]<sup>23</sup>, the programme of music (43%) is superseded by the CBSO itself (51%) as the attraction of a particular concert. The conductor was cited by 34% of attenders (although a much higher score was recorded for concerts conducted by Sir Simon Rattle), while for 37% the attraction was because the concert was part of a subscription series. For 5% it was the chance to celebrate a special occasion, for 3% because someone recommended it and for 2% it was attractive as a result of press coverage.

Market research by the Royal Scottish National Orchestra [RSNO]<sup>24</sup> analysed responses according to the type of attender: Subscribers, Single Ticket Holders and ‘Non-Attenders’ (people who go to concerts or would consider doing so, but had not been to the RSNO).

**RSNO: Main Factors in Decision Making Process (unprompted)**

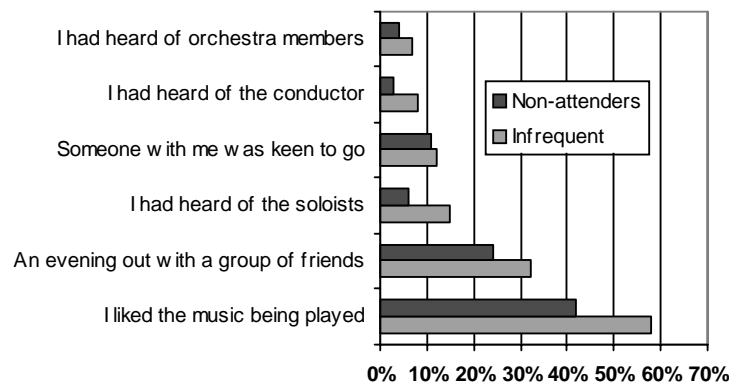


SOURCE: Royal Scottish National Orchestra Audience Survey, Scotinform (RSNO, 1995)

Once again, the programme of music to be performed is the key factor in decisions to attend a concert, but there were some noticeable differences between current and non-attenders. Non-attenders were less influenced by the repertoire, soloist and conductor, and more influenced by the price, venue and recommendation from another person.

ACE research into infrequent and non-attenders<sup>27</sup> emphasises this pattern and illustrates the point made in the *Research Digest* about the more ‘social’ concerns of non-attenders.

**Reasons for going to the last performance attended (prompted)**



SOURCE: Orchestral Concerts Quantitative Research, RSGB (ACE, 1994)

It should be noted that this section is explicitly concerned with concert-goers. While repertoire most often determines the choice of people who have already decided on attending a concert, it will, of course, have no impact on those not even considering it as an option. For those not considering concert attendance, the reasons for not doing so, and thus the messages required to persuade them otherwise, are different, and relate to the range of generic benefits outlined under the ‘Power of Music’ and ‘Benefits of Live-ness’ sections above. For these potential attenders we also cannot simply assume that a list of composers and works will have any meaning. Even a seemingly mainstream work like Beethoven’s *Eroica* symphony may require more explanation – more selling – to potential attenders than the simple listing which has instant meaning for the initiated. The section on Potential Attenders, below, deals with these issues in more detail.

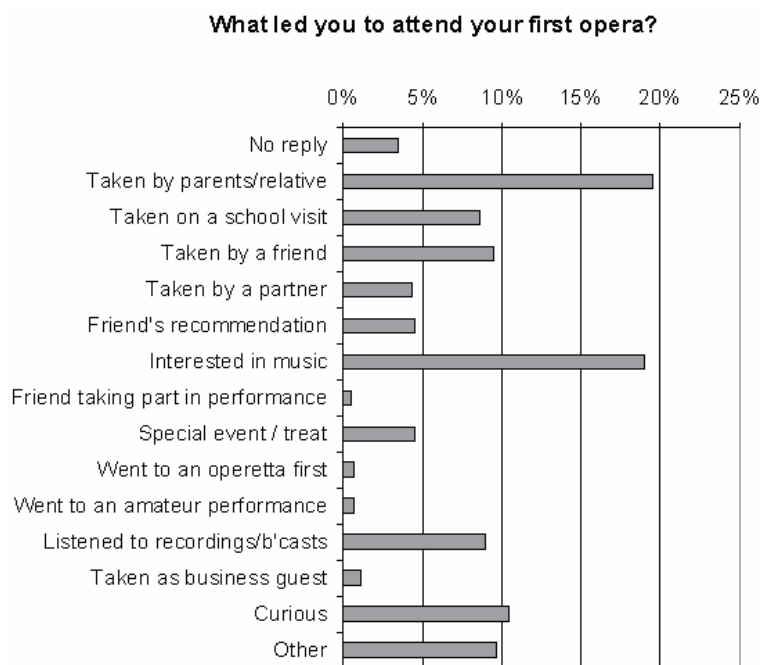
Even for those who have already decided on attending a concert there is a danger of over-simplifying the decision-making process. It is important to make the distinction here between ‘order qualifiers’ and ‘order-winners’. No research was available which reflects this level of complexity, but there may be a number of factors, such as the reputation of the orchestra or conductor, perceptions or experience of a venue, which must be right (order qualifiers) before the repertoire being performed (the order winner) is considered.

**First experiences**

How do people sample their first experience of concert-going? Received wisdom might suggest that first experiences would usually be as a child experiencing classical music either via school or parents, and that the concert-going habit is thus born or, more likely, returned to in later life.

Educational experiences and, most particularly, parental attitudes and attendance do play a key role in young people’s attendance at the arts (see section on young people, page 48). However, research from America<sup>25</sup> suggests that, in later life, peer group influences override such factors so that, regardless of childhood experiences or education, people are more likely to attend the arts if their friends do so.

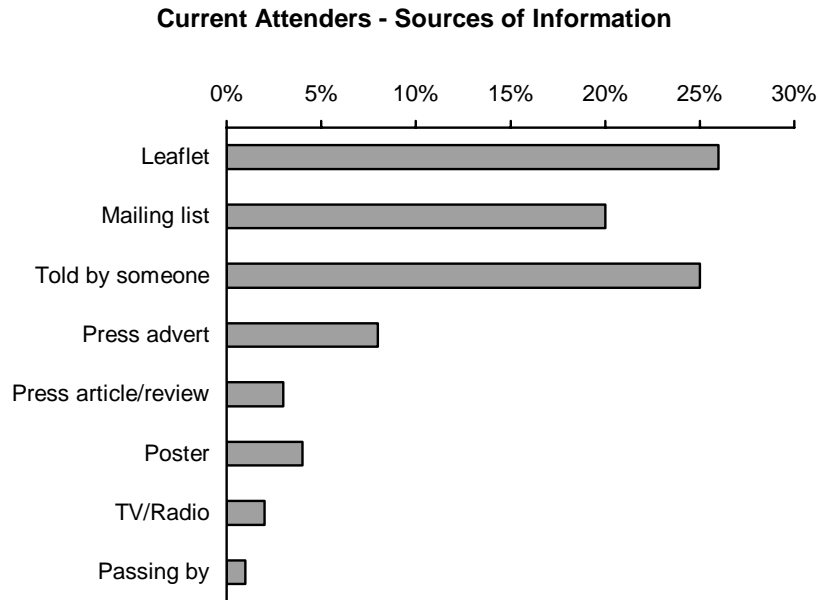
Whether as a child or an adult, it does appear that other people may be one of the most important factors in a person’s first experiences of the arts. Results of research undertaken by Welsh National Opera<sup>26</sup> suggest that 43% of attenders did so for the first time as a result of being taken by somebody else:





### ***How do people find out about concerts?***

The only large-scale generic research asking questions about sources of information for concert-goers is an aggregate of studies undertaken by Millward Brown Market Research and included in the *Research Digest*<sup>13</sup>.



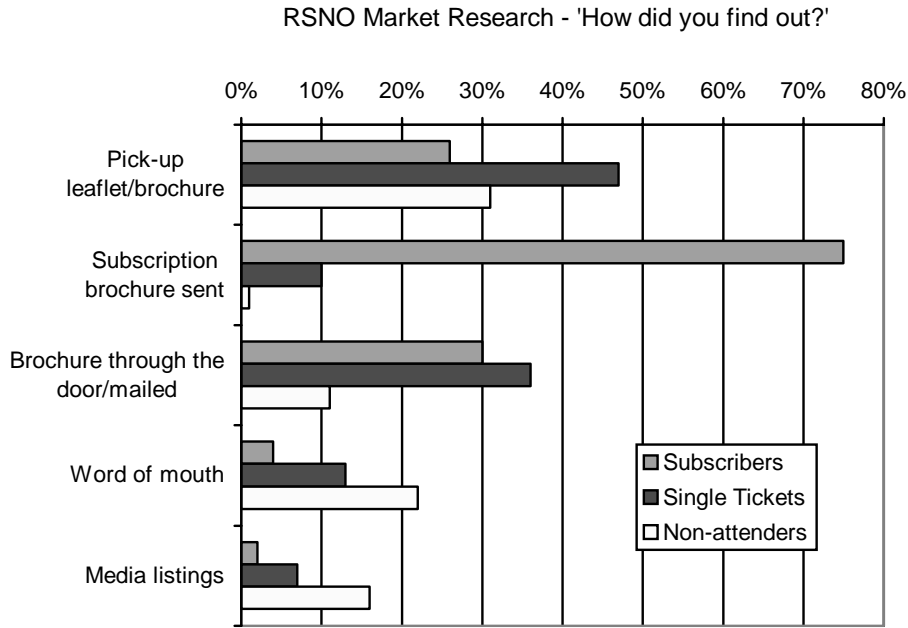
SOURCE: Research Digest for the Arts: Classical Music, Peter Walshe / Millward Brown (ACE, 1992)

For current attenders, printed material - whether received through the post or picked up somewhere - is the primary source of information, followed by 'word of mouth'. Press advertising or editorial coverage are used significantly less and 'broadcast' media, such as posters and television/radio, hardly at all.

This pattern is borne out by more recent research undertaken by individual orchestras. For example, concert attenders' research by the CBSO<sup>23</sup> found that 49% of attenders used the CBSO subscription brochure, 38% their concerts brochure and 23% the Symphony Hall Diary (the vast majority of these received through the post). By contrast 9% cited 'word of mouth', 3% press coverage, and only 2% press advertising or posters.

These results are of course skewed by the fact that, for a high proportion of subscribers and regular concert-goers, most of the audience would be expected to become mailing 'targets' - whether voluntarily or involuntarily.

In the RSNO's research, although it is not possible to isolate press coverage and advertising, there are interesting differences between subscribers, single-ticket bookers and non-attenders in their use of other sources of information:



SOURCE: Scotinform: Royal Scottish National Orchestra, Audience Survey (1995)

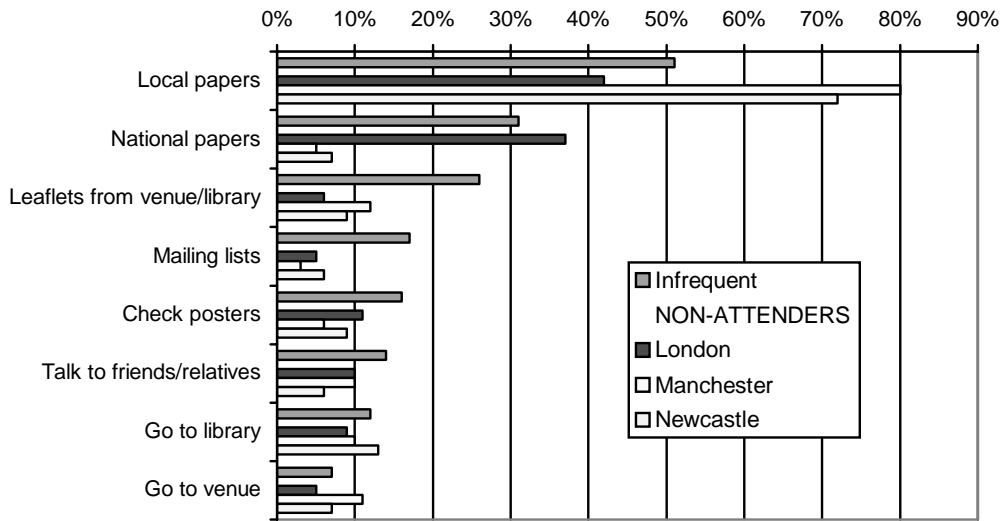
The RSNO research suggests that the preferred media for less-frequent and non-attenders are different from the media used by frequent attenders and subscribers. Not only are they not on mailing lists, but they also expect to get information from sources other than printed material.

The Research Surveys of Great Britain Survey<sup>27</sup> of infrequent and non-attenders (i.e. interested, but don't currently attend) of classical concerts asked respondents where they would expect to find information about concerts. In contrast to the information sources used by regular attenders, infrequent or non-attenders seek information first from the national and local press rather than printed material or leaflets.

The research asked respondents where they would look for information for concerts local to them. Infrequent attenders would look first in local and then national press, but would also look for leaflets in venues/libraries etc. A smaller number would also expect to receive information through mailings, check posters or talk to friends/relatives.

Non-attenders are even more focussed on the press as a source of information. Responses from London, Manchester and Newcastle have been analysed and show significant differences between the capital and the rest of the country in the use of local rather than national papers. Few other sources of information were recognised by non-attenders:

Infrequent & non-attenders - perceived method of finding out about local concerts



SOURCE: Orchestral Concerts Quantitative Research, RSGB (ACE, 1994)

Use of the internet for publicising concerts and ticket sales is still in its infancy at the time of writing and no research is currently available demonstrating its impact. See page 52 for a brief discussion of the likely impact of the internet on arts marketing.

## Potential Attenders

One of the underlying premises of this guide is that there is a huge vein of untapped potential for increasing attendances at classical concerts in the U.K.

While it would be complacent not to continually seek to inspire greater numbers with a love for classical music in all its forms, equally we must recognise that classical music will not be for everybody. However, as outlined on page 18, research suggests that there may be enormous potential for encouraging more people to attend (more) concerts.

Because so many people who go to concerts do so very infrequently (one-third of those who currently attend do so less than once a year), it is hard to draw a clear dividing line between current and potential attenders. Throughout this guide, therefore, ‘potential’ attenders refers not only to ‘non’-attenders, but also ‘lapsed’ and ‘infrequent’ attenders.

Within – and across – these definitions relating to concert attendance, different attitudes to classical music determine the likelihood of attending concerts and the barriers to them doing so. Different attitudinal types are suggested in the section on Segmentation. The following sections attempt to draw together the common characteristics, attitudes and barriers to attendance of the considerable potential identified above.

### ***What they do and how classical music fits in***

Infrequent and non-attenders may have a broad palette of options for evening entertainment and if they consider a concert it is just one among a number of competing alternatives – from going to the opera or ballet to enjoying a meal out with friends or a family occasion.

Research into very infrequent and non-attenders at concerts<sup>15</sup> found that:

*Respondents attended a variety of both visual and performing arts, but in particular theatre, musicals and rock concerts. These entertainments were perceived to offer a high degree of value and at their lowest common denominator seemed to be interpreted as ‘events’.*

The research sums up the attributes of such events as:

- being multi-dimensional (e.g. theatre or ballet);
- traditional (pantomime, an annual visit to, e.g. *The Nutcracker*);
- unusual settings (concerts outdoors or in a stately home);
- high-profile image or a famous name (e.g. big West End shows);
- a one-off opportunity (such as Dustin Hoffman as Shylock in *The Merchant of Venice*).

Other research<sup>28</sup> suggests that for infrequent attenders, concert-going is a departure from the ‘norm’ and is almost invariably chosen for a special occasion – a birthday or Christmas – and as a treat for which people will dress up.

Research for the Scottish Chamber Orchestra<sup>21</sup> suggests why this might be:

*Respondents group concerts along with other arts events as a more formal type of evening, as opposed to restaurant, cinema or pub evenings which are considered to be more informal, sociable and widely accessible. Arts entertainment evenings are also seen as being a more infrequent event.*

### ***Perceptions of classical concerts***

The following table – again from research by Millward Brown in the *Research Digest*<sup>13</sup> – shows how classical music is perceived in relation to a selection of other types of arts event. It uses an index (where 100 is average) to show how people with an interest in the arts perceives each of these art-forms relative to each other.

Non-Rejectors of the Live Arts	Theatre	Play/Drama	Ballet	Opera	Classical Music
Easily available	170	155	43	39	81
Special Occasion	185	57	102	95	91
Worth travelling to	142	91	72	75	97
Affordable	97	133	72	61	87
Better than TV	89	102	95	85	103
Entertainment	90	110	80	77	97
Go with someone	109	124	77	64	94
Tell friends about	133	130	59	60	72
Makes you think	134	210	70	104	99
Exciting	102	118	63	71	78
More than just entertainment	113	113	108	107	133
Relaxing	79	71	122	54	208
Go to alone	101	119	69	56	122
Fun	81	100	46	42	54
Too expensive	59	27	233	278	105
Demanding	61	79	142	244	144
Spectacular	47	26	184	159	72
Only go in a group	82	82	67	62	79
Never think of	11	9	231	243	95

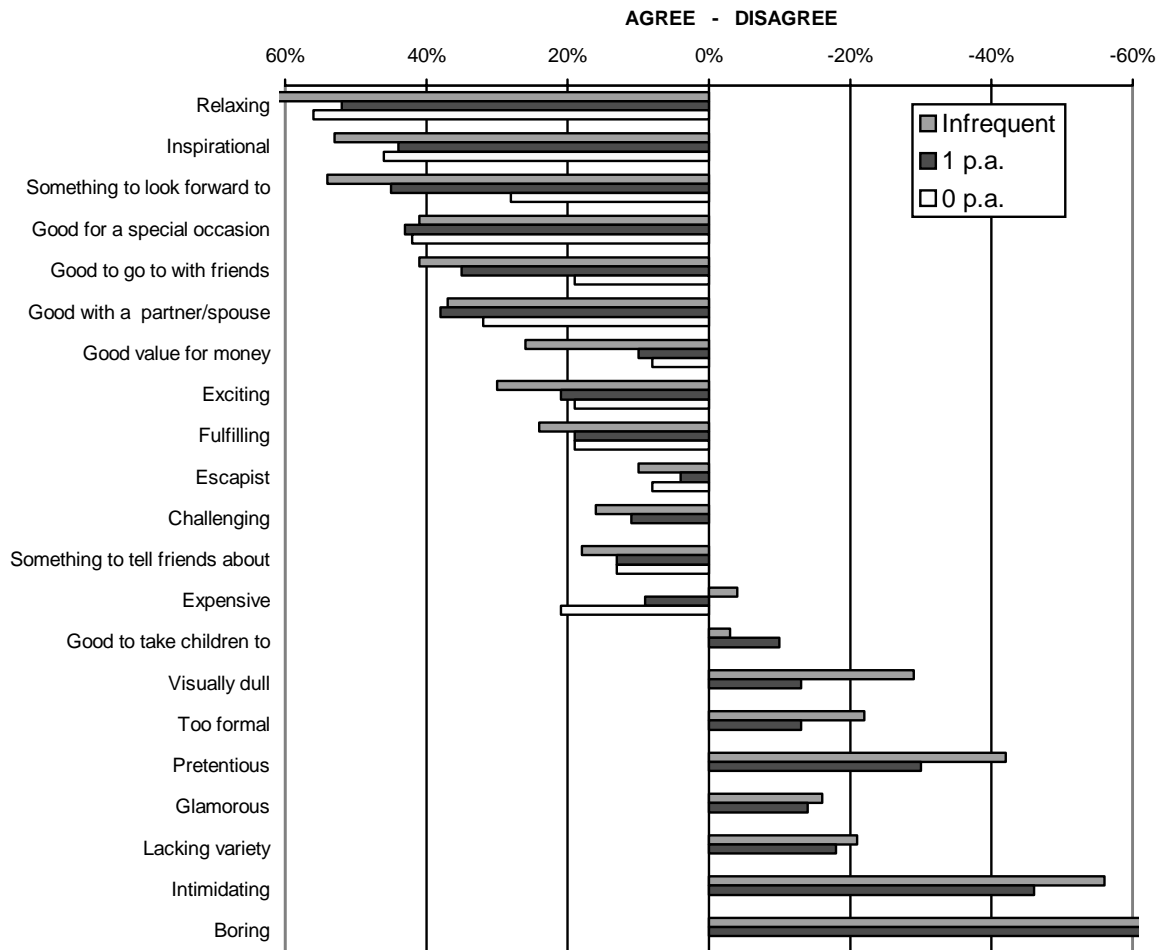
SOURCE: Research Digest for the Arts: Classical Music, Peter Walshe / Millward Brown (ACE, 1992)

Above all, classical concerts are seen as 'relaxing', although they are also 'demanding' (less so than opera). Concerts are seen as being 'more than just entertainment' and 'good to go to alone' (a characteristic shared, incidentally, by jazz), but are emphatically not 'fun'.

When these responses are analysed for those interested in classical music, some significant differences emerge. Current attenders think that concerts are not just 'relaxing', but also 'exciting' and 'fun'. They also think that concerts are good to 'tell friends about'. Non-attenders, however, do not agree that concerts are 'good to tell friends about', nor that concerts are good to 'go to alone'. They are also more likely to think of going to concerts 'only in a group' and to perceive concerts as being 'too expensive'.

Similar responses emerge from research specifically into infrequent attenders<sup>27</sup>. The table below shows the proportion of infrequent and non-attenders that agree or disagree with a series of statements about classical concerts.

Image of Classical Music Concerts



SOURCE: Orchestral Concerts Quantitative Research, RSGB (ACE, 1994)

The chief attribute of concerts is that they are ‘relaxing’. They are also seen as ‘inspirational’, ‘something to look forward to’, ‘good for a special occasion’, and good to go to with friends or a partner. Concerts are not seen as ‘boring’, nor as ‘intimidating’.

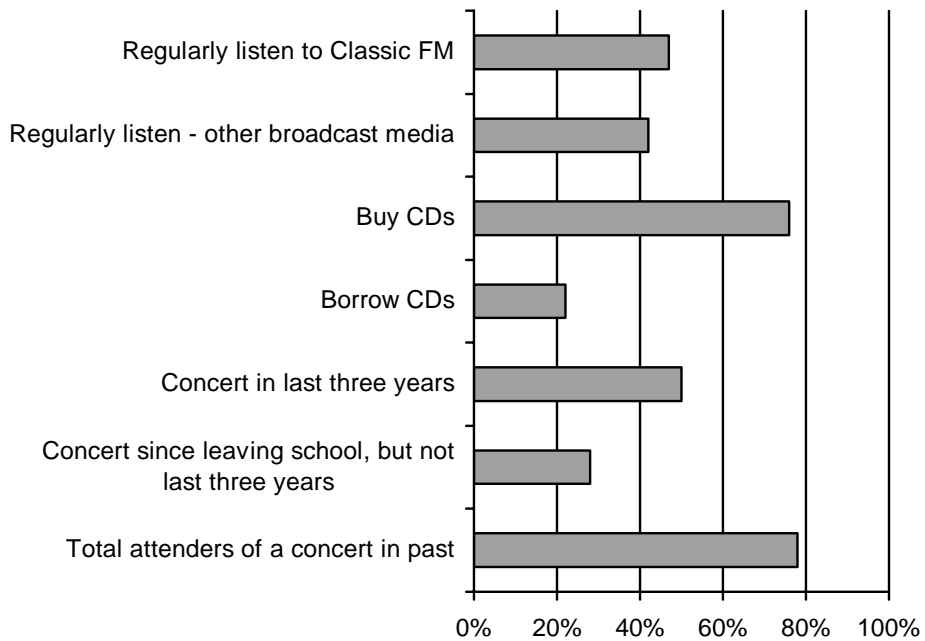
There is less agreement, however, that concerts represent good value for money, especially amongst very infrequent and non-attenders who actually consider concerts expensive. There is also only limited agreement that concerts are ‘exciting’ or ‘fulfilling’ and strong disagreement that concerts are ‘glamorous’.

**Listening patterns and concert attendance**

Listening patterns, in terms of different media available, and attitudes to classical music listening play a key role in determining likelihood of attending concerts.

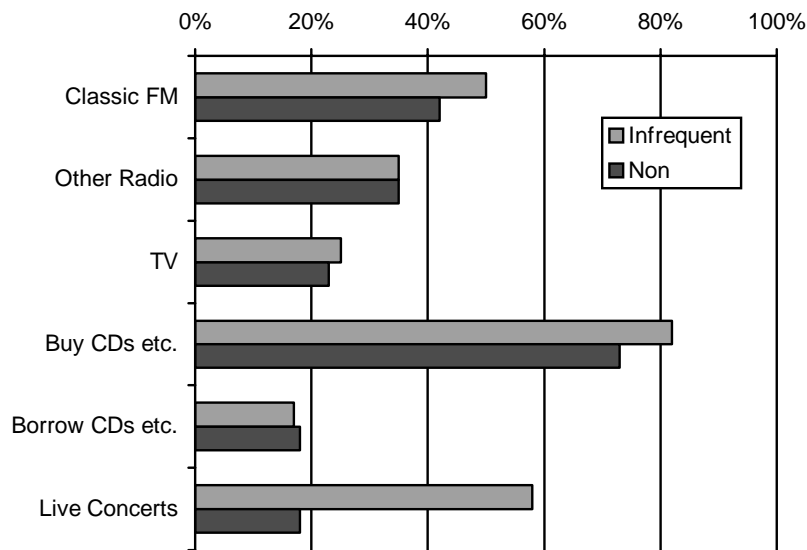
Research by the Arts Council<sup>27</sup> looking specifically at infrequent and non-attenders of classical music identified listening patterns as follows:

Infrequent and non-attenders: classical music experience



SOURCE: Orchestral Concerts Quantitative Research, RSGB (ACE, 1994)

Respondents were also asked about their preferred media for listening to classical music:



SOURCE: Orchestral Concerts Quantitative Research, RSGB (ACE, 1994)

ACE's 1997 study<sup>28</sup> observed a 'surprising' homogeneity amongst focus group respondents in their attitudes to classical music. Shared characteristics were:

- An uncomplicated attitude to music: music is used to accompany life – in the car, relaxing after work – to fit moods (“*I know what I like*”).
- A non-intellectual stance: few claim real knowledge; they lack confidence and dislike ‘pretentious’ music snobs.
- A lack of involvement in music: Classic FM was preferred to Radio 3 because it was less demanding; respondents were just as likely to listen to rock or pop music.
- Tastes that favour the mainstream: Mozart, Strauss (Johann, rather than Richard), Beethoven and Tchaikovsky (although Mahler and Shostakovich were also mentioned).

These findings back up those of the earlier study<sup>15</sup> that looked at, amongst other things, domestic listening habits. As such, it suggests that the way some people prefer to listen to classical music mitigates against them doing so in a concert setting.

This research found that many people used classical music as ‘displacement’ listening, while doing something else:

*“I like to read with my Walkman on”*

*“I often listen and do the ironing”*

Classical music on the television is less favoured for this reason; it was considered more of a committed activity, demanding attention.

More active listeners also indulged in displacement listening, but could be serious enough to plan their listening:

*“We rely almost exclusively on the Radio Times. We don’t just turn Radio 3 on for the sake of it. We look to see what’s on.”*

Committed listeners described classical music as requiring much greater involvement and as an opportunity for personal reflection, but this didn’t necessarily make concerts a more attractive proposition:

*“Listening to classical music is a solitary activity which can’t be shared. It sums up your emotional feelings at the time.”*

Lighter listeners have a ‘flirtatious’ relationship with classical music, tuning in just as happily to Radio 1 or Capital FM:

*“If we have a dinner party we choose light things that are general for everybody, like Genesis, depending on who’s there. But if I’m listening at home I put Classic FM on”*

Listening on the radio is favoured for its accessibility and the freedom to pick and choose what to listen to:

*“What I tend to do if I’m listening to the radio, I’ll flick through the dial so if I get a bit of music that I like, then I’ll listen to it, then something else might come on and I think, no, I don’t like that and I’ll flick through. I’ll just keep flicking through until I find something I like. If something comes on and I don’t like it, I’ll change channels again”.*

Accessibility and choice appealed across the board to lighter and more committed listeners. By combining these factors with the quality of sound, CDs can represent a significant challenge to persuading people to attend concerts:

*“If you’ve heard the record, what’s the point of going to hear an orchestra playing it again? You certainly wouldn’t go all that way to listen to a piece of music you’ve got on record unless there’s something more than just the music”*



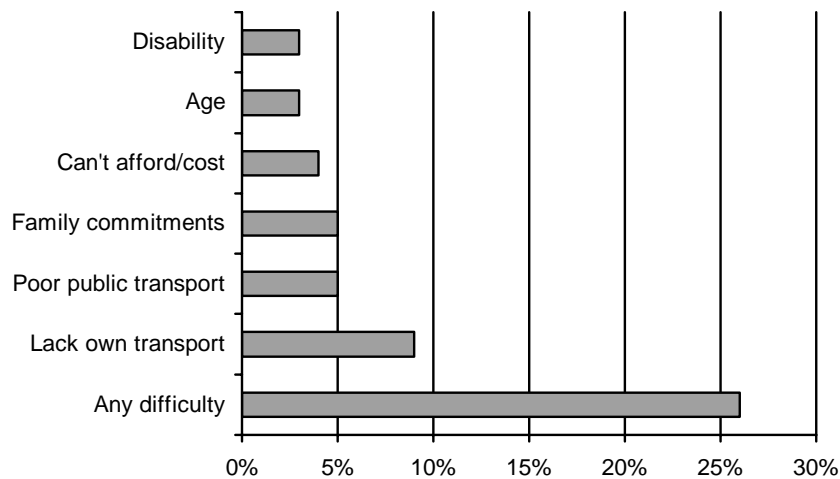
## Why don't they go? Barriers to attendance

There are many factors creating barriers to attendance at classical concerts by people who might otherwise be interested: travel or other personal difficulties, cost, lack of awareness, competing attractions, and, perhaps most telling, perceptions that an event is 'not for me'. In virtually all cases such barriers will be specific to individual organisations, local markets and environments. This section offers an outline of the nature of barriers – real and perceived – that might affect attendance. Understanding the strength and relative influence of these barriers – as well as other more specific ones – is one of the first tasks in developing an audience development strategy and approaches to researching these issues are discussed on page 62.

### **Practical reasons**

A survey of arts and cultural activities<sup>12</sup> found that around a quarter of those interested in attending any arts were simply unable to because of personal or travel difficulties.

SOURCE: Report on a Survey on Arts and Cultural Activities in GB: Omnibus Arts Survey, RSGB (ACGB, 1991)



### **Awareness**

It could be suggested that people who might otherwise, don't attend concerts simply because they are unaware of it as an option.

Research<sup>27</sup> into infrequent and non-attenders in London, Manchester and Newcastle suggests that awareness may not be an important barrier. 'Unprompted' awareness of major venues in each city was as high as 80%, with several achieving a total recall (i.e. after prompting) of 100%. Major orchestras consistently achieved over 50% spontaneous recall (the Halle had 85% spontaneous recall in Manchester), and most of the smaller, less high-profile orchestras could be recalled by 40% or more of respondents when prompted.

Although this and other research suggests that simple awareness may not be a problem for many organisations, the more significant problem is often the quality of that awareness: perceptions about whether an organisation offers 'something for me', which are discussed in the rest of this section.

### **Price**

The effect of price on people's decision whether or not to buy or attend something is very difficult to research because it is one of the issues on which people are most likely to give misleading answers. However, as a result, some complex research has been undertaken in this area and it suggests that although people may perceive price to be a barrier, in practice it is rarely the single thing that prevents them from attending.

Much of this research was undertaken by Millward Brown Market Research<sup>29</sup> and in fact they were led to conclude that many organisations could be charging more for their tickets.

In the *Research Digest*<sup>13</sup>, Peter Walshe writes that:

*People are buying a good experience and not looking for one 'that will do'. Price is only one part of the decision making process and tends to be subsidiary to bigger considerations such as whether the evening as a whole will be worth going to and what the performance will be like.*

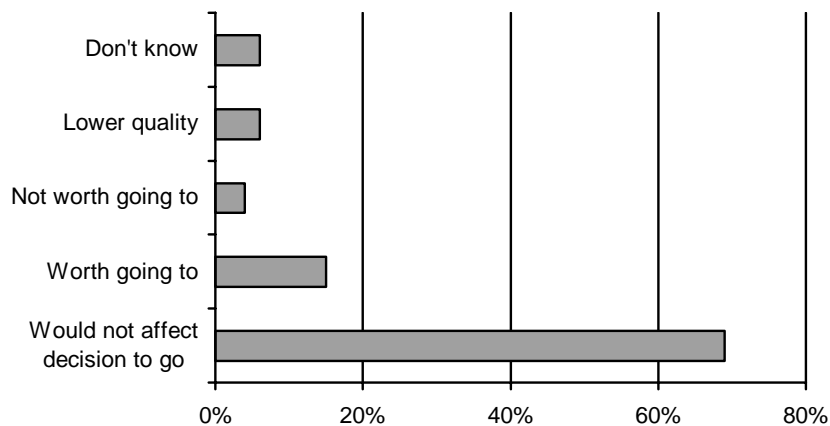
If a new or infrequent attender is being asked to consider buying tickets for something they know little about there is, in essence, a high degree of 'risk' attached to that potential 'investment' and they may therefore decide that their money is better spent on a 'safer' option ("shall I spend £5 going to this concert in a venue on the other side of town with music by a composer I haven't heard of, or pop down to the local multiplex and catch *Shakespeare in Love*?").

Lower, or reduced-price tickets can play a role in reducing perceived risk, but most people are unlikely to attend an event simply because it is 'cheap'.

The dangers of failing to target discounts to particular groups are illustrated in research quoted again in the *Research Digest*:

SOURCE: Research Digest for the Arts: Classical Music, Peter Walshe / Millward Brown (ACE, 1992)

How would your decision be affected if the price was significantly lower (i.e. £6 instead of £9)?



These findings highlight another potential pitfall with pricing: because perceived quality is the most important factor in choosing to go and see a concert it is vital that ticket offers do not erode that perception.

There is certainly a role for lower prices in encouraging people to take a 'risk' with the unfamiliar (see section below on contemporary music audiences). However, price *per se* is rarely a barrier in itself, but rather the low value that potential attenders attach to the experience they are being offered.

### ***Time 'budgets'***

Money is not the only, and possibly not the most important, budget for which concerts must compete against other forms of entertainment. Changes in working hours for many people, together with the increasingly varied lifestyle choices available to people, mean that lack of time is, for many, a near insurmountable barrier to concert attendance.

System 3's research for the Scottish Chamber Orchestra [SCO]<sup>21</sup> suggests that the busy lives of lapsed and non-attenders mean that concert-going is simply not on the 'menu' for many:

- they find it difficult to make a spontaneous decision to attend;

- the information search required to find information about concerts is time-consuming and inconvenient; and
- the ‘availability’ of concerts is restricted compared to, for example, cinema screenings, which happen several times a day every day of the week.

The increasing ‘busy-ness’ of many people’s lives – affected by lengthening working hours among a number of other factors – can be a significant barrier. System 3’s research found that the anticipation of an evening out at an arts event could even be overcome by the stress of another date in an overloaded diary.

System 3 found that the arrival of children can be a critical point of change in concert-going habits:

*Couples who previously went often to concerts may have stopped after having children, as they find their time is more occupied and it becomes more difficult to attend to the organisation and planning required to spend an evening at a concert. It is also felt that classical evenings that are currently available are not particularly suited to or attractive to children. However, most believe strongly that classical music can be interesting for children and that they should be introduced to it at a young age.*

This points to the impact that the ‘life stages’ that people go through have on their patterns of attendance; as well as on the consumption of any number of other goods and services. As the ‘events’ in people’s lives unfold – education, career, relationships, family, divorce, children leaving home, retirement – their changing lifestyles impact on their perceptions and priorities, but also on the amount of time and money they have available for concert-going. Someone in full-time education may have time available for going-out, but rarely very much money to do so. As careers develop, couples may have more money – and some time – to spend on leisure activities, until the arrival of children. More time, but not necessarily more money, will then become available as children leave home and people move towards retirement.

Of course, this picture doesn’t represent the lives of all, not least those without children. Demographic shifts also mean that, far from worrying about the number of older people currently attending concerts, this may be a major growth market in the medium term. There is further commentary about time and money budgets, and the ‘grey’ market in the section looking at future developments.

### **Value, risk and competition**

Much of the research into potential attenders suggests that there are many people – many more than currently attend concerts – who are interested in classical music and don’t reject the idea of going to concerts, but for whom concerts don’t appear on their ‘menu’ of choices for their leisure time.

Although these people are interested in classical music, it is not central to their lives, but just one among a number of interests that might feature as part of their leisure ‘diet’. Competition for people’s leisure time and money provides the context in which we should understand the reasons why they don’t attend concerts.

As suggested above, the problem with prices is not only one of cost, but of the value that people attach to the concert experience, and the same applies to time ‘budgets’. The ‘value’ of concerts as perceived by potential attenders is undermined by what they see as areas of ‘risk’ in investing scarce resources of money and, especially, time.

There is little specific research into perceptions of value and risk, but observations based on work undertaken for the SCO<sup>21</sup> and by the Harris Research Centre for ACE<sup>15</sup> are supported by elements from many other reports and a summary of these perceptual barriers is offered below:

### The Nature of the Art-form

- Music is arguably the most abstract art-form. Compared to theatre or cinema, a concert offers little human interaction or content that people can relate to or discuss. It relies on an individual's own interpretation and response to the music. Especially when music is not known, the context of a concert, where the focus is solely on an aural experience, provides few 'hooks' or 'props' to which the inexperienced can relate.
- The 'personal' nature of the experience also makes it introspective and, as a result, attending a concert can be seen as self-indulgent. This is reflected by the emphasis that infrequent and potential attenders place on concerts being 'relaxing'.
- A solely musical performance is less familiar in a predominantly visual age (cf. video, television, etc.). Potential attenders are often looking for entertainment that is exciting visually as well as aurally:

*"I went to a marvellous Baroque evening ... everybody was dressed up in late 17<sup>th</sup>, early 18<sup>th</sup> century gear. It was just absolutely brilliant. It wasn't just a musical event" (SCO)*

- Classical music suffers from peculiarly strong competition in the form of electronic media. The benefits of the live, over the recorded, experience are not obvious. The way people use music in their everyday lives – the emphasis on choice, flexibility, reflecting particular moods – makes the inflexibility of a concert less appealing.

### Social Factors

- The abstract and introspective nature of the concert experience makes it an inherently less 'social' experience (e.g. being able to discuss reactions with friends): a key factor sought by potential attenders from their evenings out.
- Perceptions of elitism can make concerts seem to be 'not for us'. The formality and protocols attached to attending concerts (what to wear, when to clap, etc.) can make the inexperienced feel vulnerable and excluded. This is emphasised by what are perceived to be the 'cliques' of regular attenders who know the drill and are often insensitive to the inexperience of others (a fact acknowledged in research amongst regular attenders, who cite 'people not knowing what to do' as a negative aspect of concerts<sup>16</sup>).
- Few but the very best concert venues are able to deliver a 'complete' evening out with all the eating, drinking and socialising opportunities that are so important to potential attenders.

### Knowledge and Information

- Even for regular concert attenders, the decision to attend a particular concert depends upon a complex assessment of a wide range of information: often more than three composers who may or may not be known, works described in a unique – as well as often foreign – language, conductor, soloist, venue, price, seating areas, and so on. If there are no familiar 'hooks' – a Simon Rattle or a Beethoven Symphony, for example – to an infrequent attender, let alone a novice, this can be decisively forbidding.
- There is also rarely any 'reported experience' or third-party endorsement to support decisions to attend. Unlike theatre, concert reviews are always after the event.
- This lack of knowledge about what to expect – in terms of the protocols, as well as the concert information – creates uncertainty and reduces the level of control people feel over the likelihood of them enjoying a concert. This translates into a high risk factor associated with attending concerts.
- The impact of these factors is accentuated by the difficulty of obtaining information in the first place. Because many concert promoters – for perfectly valid reasons – tend to concentrate promotional activity on leaflets and direct mail, for someone not already 'in the loop', finding information requires a very proactive approach.

**Competition**

All of the above may represent significant barriers in themselves, but it is in relation to the other choices available for people's leisure experiences that the perception of risk reduces the likelihood of attendance at a concert (it is worth noting that potential attenders are often attenders at a variety of other art-forms and events).

- Concerts are perceived to be expensive, associated with the price of tickets for the opera.
- Some people enjoy the formality and elitism associated with opera, but concerts do not rank with opera for a special night out.
- The perception that attending a concert is self-indulgent means that it is viewed as an occasional experience – but it is not able to compete with the theatre as an 'occasion'.
- Whilst not being a special occasion, it is also not convenient, like a visit to the local cinema.
- As an opportunity for socialising, a meal with friends, a family occasion or even a night in the pub all offer a better option.

The above relate to the 'positioning' of classical concerts relative to alternative forms of evenings out, but we should not forget that the strongest competition often comes in the form of not going out at all, increasingly reinforced by the burgeoning range of in-home entertainment options.

## The market for contemporary music

### **Current attenders**

Research into attenders at the contemporary arts in general is clear that they are not in any significant way different from attenders at other arts events:

*Eastern Touring Agency looked at 5,600 attenders at 28 venues and found no difference between attenders at contemporary and non-contemporary events by age, gender, frequency of attendance or art-form attendance<sup>30</sup>*

The fact that classical music audiences are generally older than for other art-forms means that the age profile for the contemporary music subset is by comparison slightly younger (typically between 35-50), but it appears the notion that the young are intrinsically more likely to appreciate the contemporary arts is a myth.

Instead, what marks out contemporary arts attenders is their attitude to experimentation and to risk (see 'Alternative approaches to segmentation' on page 26).

Research for ACE's Contemporary Music Network [CMN] in 1984<sup>31</sup> suggests that those open to attending contemporary music are more likely to have an 'active' than 'passive' interest in music, which is reflected in them seeking an interaction between audience and performers in a concert.

They also identified differing attitudes to, and requirements of, a concert:

*For some, music is an intellectual pleasure – they 'appreciate' it regardless of whether or not they actually like the piece:*

*"I tend to analyse music, not just listen to it... I may not like it, but I might find it interesting"*

*For others, music is an emotional pleasure which they 'enjoy'. It may be either exciting or relaxing depending on personality, mood, or the nature of the music itself.*

This distinction is discernible in later research<sup>32</sup>, again for CMN, which identified two particular market segments amongst current attenders.

- 'Academics' tend to have an educational background in music. They are 'intellect-led' and motivated by a theoretical interest, moving forward with a base of knowledge behind them.
- 'Experimentals' seek the new and are driven to explore. They have a tendency to eccentricity, are likely to attend alone and have eclectic tastes.

The South Bank Centre [SBC]<sup>16</sup> identified one group of attenders which probably most closely reflects the characteristics of the latter 'types' in both examples above, whom SBC calls 'New Modernists'. They are interested in contemporary art as a whole and see it as, in a way, pioneering new social values. They are open-minded, experimental, risk-taking and seek challenge, confrontation and the unusual. They are most definitely 'active' listeners, valuing the intimacy and involvement of a contemporary concert and getting excitement and an emotional high from the experience. Out of a sample of 84,000 names analysed on the SBC database, this group represented approximately 1,000.

### **Potential attenders**

The 1984 CMN research suggests that those with an 'active' involvement in music are more likely to attend contemporary concerts. However, at the same time, those with a more 'passive' involvement are unlikely to be potential attenders:

*Concert-goers with a 'passive' interest in music tended to reject [contemporary] music because it is unusual, unfamiliar and is therefore offensive or too demanding to listen to. Similarly, those who seek emotional relaxation found the unfamiliarity too disturbing emotionally to listen to with enjoyment.*

The later (1991) research for CMN identified two groups of potential attenders:

- ‘Experientials’ are emotion-led (“*I know what I like about classical music*”), they lack theoretical knowledge but are starting to move beyond ‘safe’ boundaries;
- ‘Fearfuls’ also lack theoretical knowledge. They are willing to learn, but lacking in confidence. They feel outside the ‘in-crowd’ and reject what they see as the ‘pretentiousness’ of much contemporary art.

In essence, then, potential attenders at contemporary music events are likely to have an ‘active’ interest in the arts; either people who enjoy classical music and may be open to experimentation, or people who enjoy experimentation but do not have experience of classical music.

### **Barriers to attendance**

#### **Perceptions & Terminology**

Contemporary classical music appears to be in a ‘Catch 22’ situation by virtue of the very terminology used to describe it. For the vast majority of ‘safety-first’ classical music attenders, (Experientials) the term ‘contemporary’ carries with it all the perceptions of risk to which they are so averse. On the other hand, for the potentially fairly large group open to experimentation across the arts (Experimentals, and some Fearfuls), the conventions and perceived elitism of classical music are what puts them off.

#### **Venue**

These perceptual barriers are reinforced by different expectations of venues. For those who enjoy classical music, their understanding of the conventions associated with the form, in traditional concert halls, represents a form of ‘safety’. Those not coming from a classical music background expect a more informal, social, less (as they see it) regimented experience.<sup>32</sup> The earlier CMN research is even clearer in suggesting that the two ‘types’ of person – those who seek emotional excitement or intellectual interest – “are unlikely to be found in the same venue”<sup>31</sup>.

#### **Price**

It is clear from research that if a person really wants to see something, price is unlikely to be a barrier to them doing so. However, where the potential attender is being asked to take a higher level of risk by attending something unknown, higher prices can create some resistance and become a barrier to attending.

#### **Communication / Information**

In both pieces of research just referred to, the way benefits are communicated to potential attenders is identified as a key barrier to attendance. Copy and images used to sell contemporary music are often written for ‘core’ attenders – Academics or Experimentals – and, as such, can be alienating for potential attenders, who require more explanation or an easier ‘way in’ to the music. This is a theme pursued at greater length in Heather Maitland’s *Is it Time for Plan B?*<sup>33</sup>, which is highly recommended reading for anyone engaged in selling contemporary music concerts.

## Young People and Classical Music

No specific research on young people and classical music has been found in researching this guide. However, a recent publication by the Calouste Gulbenkian Foundation, *Crossing the Line*<sup>34</sup>, provides an in-depth review of more general literature on young people and the arts as well as reporting attitudinal research undertaken with a small group of young arts attenders and non-attenders. This section is largely based on a summary of this research and, unless stated otherwise, all references are quoted in *Crossing the Line*.

### **Attendance by young people**

It is clear from national surveys that attendance at classical concerts is lower amongst the younger sections of the population. The Arts Council's 1991 Survey<sup>12</sup> found that 6% of 16-19 year olds claimed to attend orchestral concerts, as did the same proportion of 20-24 year olds, with claimed attendance rising only slightly, to 7%, in the age range 25-34.

A survey using questionnaire responses from 11-16 year olds included questions on arts attendance as part of a school trip, and found that 11% claimed to have attended musical (not rock or pop) events (O'Brien, 1996). However, open-ended (i.e. unprompted) questions used in a different study by the National Foundation for Educational Research [NFER] suggested a much lower level of attendance, at just 2% (Harland & Kinder, 1995).

There appear to be significant variations among young people according to age, with claimed attendance declining as children progress through their teens. The 14-16 phase in particular is associated with low attendance at cultural venues, although there is some evidence of renewed interest in the 17-24 age group. Harland and Kinder offer some explanation for this trend:

*One possible interpretation of these findings is that attendance in the early teens is higher due to the perceived acceptability of the image of attending such venues as part of the family. As children mature to the mid teens, increased desires for independence, peer group influences on new forms of social interaction, along with the pressures of examinations, make it less acceptable to attend cultural venues with parents. In the early twenties, often with the demands and financial constraints of tertiary education behind them, more young people, especially those who have inherited cultural capital, re-engage and redefine them as part of their own emerging independent life style, meanings and social network.*

Research conducted for Marketing the Arts in Oxfordshire [MAX]<sup>35</sup> asserts the importance of recognising three stages of maturity among teenagers and how it affects their attitudes to the arts. They found that:

- Young teenagers tend to be keen to belong and need the security of a group. They are open to influence and eager to learn. They can be excited and earnest, if a little daunted.
- In the mid-teens young people are thinking about their place in adult life and are keen to assert their individuality. They are more confident and adventurous, and are increasingly proactive and demanding. They are also becoming more discriminating and sophisticated in their tastes.
- Older teenagers are more integrated into the adult world, either studying post-school or starting working lives. They are more knowledgeable (even jaded) and less impressionable. They are very concerned with forming and maintaining the social networks in which they are immersed.

Both of the studies quoted in *Crossing the Line* found variations by gender, in that girls were more active than boys in out-of-school attendance. The NFER study also found that attendance was strongly influenced by social class:

*Relative to young people from skilled or semi-skilled backgrounds, young people with parents in professional occupations were twice as likely to be theatre-goers and three times more likely to go to live classical performances.<sup>34</sup>*



## **Influences on attendance**

Harland and Kinder identify three key influences on young people's attendance at arts events: schools, family and friends, and cultural organisations themselves.

Schools can have a great influence on young people's perception of, and attendance at, arts events, but this can be both positive and negative. In the NFER study, 14% of respondents cited a secondary arts teacher as the single most important factor in developing their interest in the arts, but 9% reported a negative influence.

The original research in *Crossing the Line* found that, overall, there were far more examples of schools facilitating attendance than providing a negative influence, but the latter is illustrated by the response of one girl, aged 14:

*I think what's affected me most is my school, because I had music. I was forced to sit for hours with my friends, as my music teacher just used to play us bits of music and make us write down about them and that's why everyone hated music lessons and that's why I gave it up.*

Harland and Kinder also make the point that although creative and participatory arts activities at school can be more 'fun' and create greater engagement, they will not necessarily result in attendance as a 'spectator'. They suggest that:

*The goal of cultural inclusion would also seem to demand the development of listening, viewing and critical skills necessary for audience access, as well as an awareness that audiences, too, make a vital contribution to arts experiences and cultural activity.*

The potential dislocation between school experience and independent attendance at a cultural venue is emphasised by the way in which schools can operate as 'closed' societies where behaviours and experiences do not necessarily relate to the outside world. This was emphasised in Harland and Kinder's previous research, which reached one very low-level attender who:

*associated arts and culture directly and solely with school. The fact that the two were intricately intertwined meant that now she had left school, she wished to "leave all that behind and get school out of my head".*

Families appear to be less likely to put young people off arts events, other than through a general parental indifference that may be transferred to children. Harland and Kinder's 1995 study reported positive influence as having an 'osmosis' effect in developing young people's interest in the arts, with females and high educational achievers most likely to cite their parents, particularly mothers, as a significant influence.

Peer group attitudes, however, are more likely to have a negative impact on arts attendance among young people. The *Mass Observation Study* (1990), quoted in *Crossing the Line*, found that 47% of respondents in lower socio-economic groups cited 'my friends don't tend to go' as a reason for infrequent attendance.

Harland and Kinder comment again on the emphasis placed on participatory involvement by cultural venues, rather than the development of 'audience' skills and call for a long-term study into the impact of such work on attendance in later life. They refer to the important point made by the National Campaign for the Arts, that where attendance is to be encouraged, it should be for work of the highest quality, rather than using "the hard-to-sell shows and least popular evenings or seats". Their review of literature also highlights the benefits families seek from cultural venues:

*It has been suggested that families want opportunities to interact socially and participate actively in things, rather than opportunities to learn or do something worthwhile with their leisure time. Entertainment is regarded as a key element.*

## **Attitudes to attendance**

Harland and Kinder's literature review highlights the fact that many young people simply do not think of the arts as 'for them'. One participant in their group discussions identified the very fact that it was 'for adults' as a reason for not engaging – rejecting the arts as a way of asserting his own independence.

For the majority of the young people they spoke to, this was particularly true of classical music:

*When asked whether she would ever go to an evening of classical music, a 17 year old replied, quite emphatically, “No, not at all because it’s really baggy and sad”... Only one girl out of the twenty interviewees, with high levels of participation, expressed positive views about the classical music tradition... The rest of the sample perceived classical music performances as formal occasions (‘It’s people that are dressed up in tuxedos with their opera glasses.’), often very long (‘It’s just sitting there for hours listening to some woman whining on.’) and not for young people (‘I don’t think classical music is aimed at our age group.’)*

They also found, however, that negative perceptions of arts events – felt most acutely in apprehension of a visit – were not reflected in events actually attended. The majority of their group did see the arts as important, citing benefits such as a “social opportunity”, “enrichment”, a “feel-good factor”, “promoting creativity” and a “learning experience”.

Accounts of negative experiences focused around three main factors: a lack of understanding of the ‘form’; feeling alienated from the ‘ambience’ of a cultural event; and a rejection of the actual content.

Specific barriers to attendance, beyond the influences outlined above, included factors to do with the event itself: the cost of travelling to the event itself and paying to get in; a lack of awareness (stemming from a sense of insufficient or inappropriate publicity); timing of events; and the intrinsic content (classical concerts, in particular, were felt to lack visual interest). Personal factors creating obstacles to attendance included: not having the time; not having anyone to go with; a feeling of being out of place and conspicuous at events; peer group disapproval; and feeling out of their depth because of a lack of understanding.

The interview groups were also asked what would be their suggestions for improving attendance. Ideas included: promotion through schools; making events more social and more ‘fun’; making the event shorter; including a ‘modern’ content (better representing their way of life); cutting the cost; including young performers and issues of relevance to young people; taking arts ‘to the streets’; and, simply, providing the opportunity. They also felt that what was needed was more advertising to raise awareness, specifically targeted at the youth market, which better conveyed the content of an event, and which was engaging and capable of capturing the interest of young people.

The MAX research<sup>35</sup> describes four market segments in terms of young people’s attitudes to, and likelihood of attending, arts events. For the ‘Embarrassed’, while they have some latent interest, the arts are ‘not cool’ and do not match their current lifestyle. They have had little introduction from parents and peer acceptance is vital for them to have any likelihood of attending. ‘Enthusiasts’ are older, they attend several times a year, and the arts are part of their identity – possibly including participation in some form of arts activity. ‘Dabblers’ are also older, the majority female, and enjoy occasional arts events but are passive attenders, open to more opportunities if they are made readily available. ‘Drag-alongs’ have little natural affinity to the arts and no real latent interest, and attend events because they have to, for example as part of a school trip.

The MAX research also asked young people what might persuade them to attend more arts events and responses largely matched those found by the *Crossing the Line* researchers - better targeted events with more relevance, better advertising, more excitement and a more socially ‘comfortable’ setting - as well as addressing the practical issues such as cost and travel.

## The Future – Threats And Opportunities

The pace of change – in society and technology especially – is accelerating so quickly that it would be futile to attempt predictions for the arts in the 21<sup>st</sup> Century. However, a report by the Henley Centre for Forecasting on future trends was published jointly by the Arts Councils of England, Scotland and Wales in 1995<sup>36</sup>, and since then it's co-author, Ian Christie, has given a number of presentations about future challenges the arts are likely to face. This brief section draws mainly on his work and aims, principally, to highlight the importance of thinking ahead and being flexible in meeting people's changing needs and expectations.

### *The 'greying' population*

The U.K. population is ageing, quickly. By the year 2050, projections suggest that the number of people of pensionable age will have increased by 50%, from 8.9 million (in 1991) to 13.5 million<sup>37</sup>. In effect, what we will be seeing is the 'greying' of the baby-boomers born in the 1950s and 60s.

In the medium-term, then, the biggest growth market in the U.K. will be amongst those over 50 years old. The post-work period of life is now 24 years – 1/6 more than 25 years ago - of people with time on their hands. 'Greys' currently also outspend the under-50's by around 20%. The age profile of arts attenders is, and has been for some time, concentrated in the older section of the population. The fact that this profile, although older, has not itself aged may suggest that many arts activities appeal more to a maturer population. On the face of it, therefore, the 'demographic time-bomb' should represent an opportunity for the arts to expand its attendance from within the market where it has traditionally been most successful.

There are not, however, any guarantees that the new generation of pensioners will adopt the same patterns of consumption or attendance as their parents. After all, how will we define a 'traditional arts attender' when Mick Jagger is 60?

### *Work and welfare*

The world of work is also changing quickly. Many more women now work outside the home and there are many more families with both parents working. The types of work available are also changing. Forecasts suggest that the biggest shift will be away from full-time permanent jobs (set to reduce by 25% by 2010) towards full- and part-time temporary work and self-employment<sup>37</sup>.

One of the best-reported impacts of an ageing population is the impact on social security spending and the sustainability of the state pension scheme. Since the 1980s, individuals have been encouraged to take out personal pensions and contract-out of the state scheme. This is a trend that is now extending payments to ensure future security (such as pensions and life insurance) to other areas of welfare insurance and such 'defensive' expenditures will increasingly erode the disposable income available for such things as arts attendance.

Ian Christie suggests that current trends in working patterns are creating a new and critical division in society between those who work and those who don't. For those in work, the pressure to work longer hours for higher rewards – particularly strong in the U.K. – will continue, creating a work-rich/time-poor middle class. Because women are now much more likely to work, childcare is increasingly shared and there is great pressure for working parents to spend what free time they have with their families.

These factors also contribute to the growing exclusion of those unable to find work, who are caught in the opposite time-rich/work-poor trap.

Together, these factors will create a double 'squeeze' on people's ability to attend the arts – those able to afford to do so (although with an increasingly restricted capacity for such discretionary expenditure) will have very little leisure time, while those with 'free' time will have no money to spend.

### *Globalisation and the 24-hour culture*

Demos have coined the term 'connexity' to describe the way global boundaries are dissolving. Governments are interconnected, markets and companies are linked locally, nationally and globally, and individuals are

connected to events worldwide through media and the Internet. Events on the other side of the world can now affect us sooner rather than later, and individual national governments are increasingly impotent in the face of vast multi-national corporations and the rapid international flow of capital. The Millennium celebrations formed an unprecedented global party, and the fact that over 200 million Chinese viewers tune into *Baywatch* suggests the development of a global monoculture.

Ian Christie proposes that the live arts might benefit from a reaction against such a commercial monoculture. He suggests that people will increasingly be searching for connections on a more individual basis, for relationships with organisations and a sense of community, and that arts organisations could be well-placed to offer such 'soft' benefits and 'real' experiences as an antidote to global 'McCulture'.

What the arts won't be able to escape is the increasing move towards a 24-hour society. Banks and supermarkets are just some of the businesses responding to people's increasing expectation that they should be able to access products and services when it is convenient to them. As demographic and work patterns shift, arts organisations will need to be increasingly flexible about the times they are open for business, as well as the times of performances.

### ***The politics of accountability***

Despite the 'personalisation' of welfare risk described above, an ageing population will continue to exert upwards pressure on state welfare expenditure. The success of 'New Labour' has seen a re-invention of political consensus, around a lightly regulated free market economy. Both of these factors, and the reduced impact of government in the global economy, have implications for overall levels of public expenditure: as a proportion of GDP, it is very unlikely to increase above current levels. This will continue to put pressure on public funding of the arts, both from central and local government.

It seems likely, therefore, that publicly-funded arts organisations will increasingly be required to be more financially self-reliant. What is certain is that the increasing accountability required of organisations in receipt of public subsidy – as revealed, for example, by the attendance targets set in 1998, or the launch of QUEST the following year – will not subside. The high profile and transparency of the National Lottery will continue to fuel public debate, in general terms, about the cost and value of arts funding.

### ***Technology***

Perhaps the greatest threat to the arts to have developed in the last 30 years is the burgeoning competition from alternative forms of entertainment, principally in-home entertainment via electronic media. Just 20 years ago, video machines were a rarity, personal computers didn't exist and the U.K. only had three television stations.

Internet access is currently relatively low in the U.K., but growing exponentially. Digital television will accelerate Internet access as well as bringing a vast choice of television channels to ever more homes. During 2000, BT will be offering phone lines capable of carrying digital recordings and eventually CDs will become a thing of the past as people access the particular music they want to hear, when they want to hear it, over the Internet. These are just three of the factors that will contribute to the continuing increase in competition that the arts will experience in trying to win attention and commitment from a wider potential audience.

The American marketer, Joanne Scheff<sup>38</sup> suggests that the Internet will also have enormous implications for the way we communicate with customers.

*Information flows have [to date] been one-way, with a finite reach and finite delay. In the information age, these exchanges will be customer-initiated and controlled, and communications will be two-way, instantaneous and have infinite reach. Customers will demand new rights:*

*Right to know: to expect full information about products and services.*

*Right to expect silence: to be exposed to advertising and direct mail on an invitation-only basis.*

*Right to vote: to be invited to give feedback, and for marketers to react to that feedback.*

*Right to be remembered: to assume that marketers will remember all the information they have provided the organisation and to use this information in all future dealings.*

Scheff goes on to suggest that customers will move away from being passive receivers of information, for example through access to third-party information about products and services (including from other customers) and that they will expect greater levels of individual customer service, such as the ability to define product features and options tailored to their own needs.

However, Scheff also points out that the Internet will create great opportunities for small, under-resourced organisations: small organisations can be just as accessible on the World Wide Web as larger ones; they have the opportunity for infinite reach and can offer a 24-hour, 7-day ordering service; and the Internet offers the chance to communicate directly with large numbers of customers at a fraction of the cost of printed material in the post.

The impact of the dominance of electronic media will be greatest on young people who have grown up in the digital age, and there is little evidence to suggest that today's teenagers will adopt others' consumption patterns, even those of their parents.

## PART TWO

# Planning an Audience Development Strategy

In her *Guide to Audience Development*<sup>39</sup>, Heather Maitland sets out the nine steps involved in the process of planning an audience development strategy. Since one of the principal aims of this publication is to avoid re-inventing wheels, the summary of those steps is simply re-printed below, with some additional notes where appropriate. It is strongly suggested that interested readers obtain a copy of Heather Maitland's book for a more detailed explanation of the planning process and case studies from across the arts.

### **STEP ONE – CHOOSING WHO TO WORK WITH**

Too many audience development projects seem to involve organisations first of all thinking up events or ways of working which appeal to them and only afterwards looking around for sections of the community to which to apply them. Audience development is about enhancing and broadening specific individuals experiences of the arts so we need to start with those individuals.

### **STEP TWO – COLLECTING INFORMATION ABOUT YOUR TARGET GROUP**

You need to collect the information that will help you plan an effective audience development project. Before you can choose your target group you need to know what your existing audience and the local population are like. To overcome the barriers that stop people attending the arts, you need to know what they are. To help someone make informed choices about attending or participating in an arts event, you need to know what information they need. You do not need limitless resources: your organisation will already have collected some useful information and much of what you need will be available through research published by other organisations. Besides, some of the smallest voluntary arts organisations regularly carry out effective audience research.

## **COLLECTING INFORMATION**

The research section of this guide is intended to give an overview of the sorts of information already available about existing audiences and potential audiences. You will, however, need to 'fill-in' this picture with further information about your particular organisation and environment.

There are basically two ways to collect information about audiences: desk research and original research.

### **DESK RESEARCH**

The first sort of research to be undertaken should always be desk research – because, in the main, it's free.

#### **Third Party Research**

There are a number of other sources of information that can be obtained free, or cheaply. Most local authorities will have, and make available, information about the local population profile, and Regional Arts Boards and the National Marketing Agencies normally hold libraries of their own (see Appendices). National data is also available from the Office of National Statistics, much of it in a searchable format on their website.

#### **Sales and database analysis**

One of the most under-used sources of information about existing audiences is the data held in venue box offices. An enormous amount of information can be gleaned by detailed analysis of box office sales and database records: how many people are attending and how often, what they attend, how many people they come with, when they book, how much they spend, and so on.

As well as being the essential first step in defining the 'problem' your audience development campaign is meant to solve, such information can begin to tell you something about the composition of your audience and their behaviour, and allow you to start segmenting your audience according to their needs and behaviours.

Database information can also be enhanced by using a number of different 'profiling' techniques to improve your understanding of what sort of people they are and compare them to the local population as a whole.

### **ORIGINAL RESEARCH**

If a concentrated search through existing information, combined with common sense and discussion, still leaves you needing more information, you should then consider undertaking or commissioning original research. There are many pitfalls in undertaking and interpreting original research and given that it can be expensive, it is well worth taking expert advice. There are two basic types of original research: quantitative and qualitative.

#### **Quantitative Research**

Normally uses 'closed-ended' questions where you already know the range of likely responses – e.g. age, media consumption, number of attendances at various events, etc. – and is thus best for understanding the numbers: how many, how much, how often, etc. It is possible to include questions about attitudes or perceptions, but you need to be very sure that you can cover all likely responses if you are not to get a distorted picture.

The most common form of quantitative research is the self-completion questionnaire either distributed at concerts or, for more reliable sampling, mailed to pre-determined representative segments of a customer database.

Other quantitative research techniques – and ones that allow more 'qualitative' elements to be introduced – include face-to-face interviews based around a questionnaire and telephone research.

N.B. Much research is most useful when it can be compared to something else, e.g. national trends. When framing research questions, always try to ensure that categories (e.g. age ranges) match those used in other research.

#### **Qualitative Research**

The research described above leaves a vital piece missing from information about your audiences: the 'Why?', and more particularly, the 'Why not?' – attitudes towards, perceptions of, and barriers to attending your organisation's activities.

Qualitative research can be conducted via focus-group discussions, where it is particularly advisable to engage an independent expert, but as long as too much is not read into the results, organisations can conduct their own 'customer circles' – most useful for checking audience reactions to particular initiatives, promotions or designs.

### **STEP THREE – MAKING USE OF THE INFORMATION**

You need to pull out the key facts from information you have collected. These will help to shape your project. Also find out about audience development projects carried out by other organisations and aimed at similar target groups – whether these were successful or not.

### **STEP FOUR – CHOOSING THE ARTS EVENT**

You need to choose or even create an event which is likely to interest the target group and to overcome the barriers which currently stop them attending. Some of the most exciting audience development projects have at their centre taken an imaginative approach to the arts event.

### **STEP FIVE – PLANNING THE PROJECT**

For your project to be a success, everyone involved must know why they are doing it and what, exactly, they are trying to achieve. Arts organisations often invest heavily in audience development projects, but most are unable to say whether they were worth the investment, whether they are worth doing again or even whether they worked at all. The solution is to make sure you plan effectively. Set clear aims and specific objectives, and work out beforehand how you are going to evaluate the results.

#### **SETTING ‘SMART’ OBJECTIVES**

##### **Specific**

How many new audience members do you need, 50 or 500? What proportion of your audience do you want to be under 25 years old, 5% or 50%? Being specific about numbers of people can break your task down into manageable chunks and provides the yardstick against which you can judge whether your strategy has succeeded.

##### **Measurable**

There's no point in setting objectives if you can't tell whether you've achieved them. If you want more young people, how are you going to count the numbers who respond?

##### **Agreed**

Objectives should be widely understood and agreed within your organisation, so that those involved in carrying out the strategy are clear about what it is you are trying to achieve.

##### **Realistic**

There's nothing more de-motivating than never achieving your targets. Make sure your objectives are achievable and that you have sufficient resources to meet them. If you current attenders are predominantly retired, how realistic is it to expect 50% of the audience for your next concert to be under 25 years old?

##### **Timetabled**

By when do you aim to achieve your objectives? Set a clear timetable with staging posts. This provides a framework upon which you can hang your strategy.



### **STEP SIX – CONSULTATION**

Before you carry out the project, you need to check that it stands a good chance of working. Try out your ideas on your own colleagues, your counterparts in other organisations and people with the relevant expertise in your Regional Arts Board or local authority. You must also consult the target group.

### **STEP SEVEN – IMPLEMENTING THE PROJECT**

Attention to detail is important at this stage. There are seven areas of activity to think through carefully. This will ensure that there are no unexpected problems that might prevent your target group from attending or participating, or stop them coming back again.

**SEVEN AREAS OF ACTIVITY**

The *Guide to Audience Development* neatly summarises the seven P's of the marketing mix, which are paraphrased below:

**Product**

This doesn't just mean the performance on stage – audiences and attenders see every aspect of their visit as part of the product you offer (comfort of seats, catering facilities, car parking, programmes, etc.)

**Price**

Many audiences see comparatively high prices as an indication of good quality, while several target groups find that they cannot afford normal ticket prices. A good way of balancing these two issues is to set top price tickets as high as the market will stand but then offer discounts to the target groups who find price is a barrier to attendance. It is a good idea to make sure you point out how much the potential attender will save – this is a way to make sure you signal the high quality of your event. Price doesn't just involve the cost of the tickets – lots of other costs can be involved in attending the arts, including parking, baby sitters, ice creams, programmes, drinks, etc.

**Place**

The venue for your event can be a barrier to attendance by your target group. It is important that a special effort is made to make first-time attenders feel more at home. 'Place' also involves how your potential attender or participant gets hold of a ticket. Telephone hotlines or a personal booking service are ways of making the process as simple as possible.

**Promotion**

Describes how you communicate with your target group and the offer that you are making them. It is essential that you take into account everything you have found out about your target group to make sure that you are telling them the things that will persuade them to attend or take part in your event. Ensure that you have chosen a communication method that will be effective and that you are using an appropriate tone of voice. Sales promotion involves offering your target group something that only they are entitled to for this project. This could be:

- money off their ticket (where your target audience is put off by what they perceived be the high cost of attending);
- something extra free e.g. a free ticket, perhaps a two-for-one offer or a free guided tour (where your target audience is not motivated by cheaper tickets);
- a free gift e.g. a book or CD linked to your event; and/or
- a prize draw or competition.

**People**

Many non-attenders feel alienated by theatres, concert halls, museums and galleries. Your front line staff members are the people who can make them feel at home. Some organisations have made sure that their younger stewards are on duty to welcome participants in a project aimed at young people.

**Process**

You need to check every step of the process that your potential attenders or participants will have to follow to get involved in your event. Is it clear that they what they should do to respond? Will they be able to find the venue? Do the box office assistants know about any special offers?

**Physical evidence**

Arts organisations offer an experience rather than a tangible product. Our attenders and participants cannot be sure they will enjoy an event until after they have experienced it. This means you must make sure that everything you do reassures your target audience that you are offering something that is of good quality e.g. a high standard of printed material, the appearance of the foyer and the efficiency of the box office.

**STEP EIGHT – SUSTAINING THE RELATIONSHIP**

Just because someone has been targeted by an audience development project does not mean they have become an arts attender or participant. Becoming an arts attender involves a series of steps. We must effectively persuade people to take the next step. This means keeping in touch so we can develop our relationship with them.

**STEP NINE – EVALUATING THE PROJECT**

Evaluate the immediate aftermath of the project. Did your project achieve its targets? Was it an effective use of resources? How did it contribute to your organisation's overall artistic, social or financial objectives? Did it achieve any unexpected results – 'spin-offs'? What did your target group think of the experience? Is there anything you would have changed? Is it worth doing again? You also need to work out what have been the medium- and long-term effects on your target group's arts attendance or participation.

## PART THREE

# Audience Development: Some Objectives and Strategies

Arts organisations' objectives tend to fit into three main categories:

- **Artistic** objectives, relating to the type of repertoire to be performed and quality of performance;
- **Social** objectives, relating to the people who are to experience that artistic 'product'; and
- **Financial** objectives, relating to the financial sustainability of the two former objectives.

In addition, arts organisations may have **Political** objectives aimed at opinion formers and decision makers, as well as **Ethical** objectives relating to the way in which they wish to conduct their business.

Audience development, in its many forms, has a critical role to play in achieving all of these objectives. This section focuses on six major areas of concern to anyone involved in promoting concerts of classical music:

- Introducing first-time attenders;
- Getting them back;
- Increasing frequency of attendance;
- Extending the core audience;
- Developing repertoire tastes;
- Developing audiences for contemporary music.

For each objective, the implications of research findings are outlined, together with suggested approaches and observations on appropriate tactics. A number of case studies of effective campaigns employed by organisations around Britain are also included to give ideas of how other people have addressed these issues.

### ***Introducing first-time attenders***

As the research in the previous section suggests, a very significant proportion of the population does not dismiss the idea of concert-going. Many may be quite open to the suggestion that they might attend a concert if they were approached in the right way.

What is a first-time attender? Is it someone making their first visit to your organisation? Is it someone attending their first classical concert? Is it their first experience of classical music? Or could it be someone who came as a child and is returning for the first time as an adult? Obviously people with these different levels of experience – and all points in between – will all have different attitudes to, and pre-conceptions of, the concert experience.

Some of the perceived barriers to attending concerts for ‘potential’ attenders are set out on page 41. The ‘sort’ of first-time attender you are addressing – defined by the nature of their previous experience of classical music – will determine which of these barriers are most important and how they relate to each other. For your first-timers campaign to be really effective, you will need to be clear about who it is you are addressing and research the specific barriers to them attending your organisation.

### **Persuading potential attenders**

The most important issue to address in attempting to persuade people to attend a concert for the first time is their attitude to classical music and their perceptions of concert-going.

Some of these attitudes, perceptions and behaviours are characterised in a number of the market segments described on page 20 (Classic FM’s ‘Populists’, ‘Hooked on Classics’ or ‘Companion Listeners’, or what Harris research describes as ‘Active’ Listeners).

What potential attenders are likely to have in common – and what they have in common with many who already attend concerts – is that classical music doesn’t play a very important part in their lives. Most people have a very uncomplicated attitude to music (“*I know what I like*”), have a limited knowledge of classical music and, consequently, tastes that favour the mainstream. Furthermore, they are likely to have an anti-intellectual stance and a fear/suspicion of what they see as the intellectual snobbery associated with classical music. The prospect of going to a concert is also likely to have to compete with a wide variety of other alternatives for an ‘evening out’; a meal with friends, a visit to the cinema or another form of arts event.

Potential attenders are more likely to be seeking ‘basic’ and ‘social’ needs from an evening out at a concert (see ‘The Power of Music’ section, page 25). Their appreciation of classical music is more likely to be emotional than intellectual; above all, they think of classical music as ‘relaxing’ (have you noticed how often Classic FM describe their output as ‘relaxing’).

A concert is likely to be a ‘special’ evening out; a treat. As such, the ‘peripheral’ elements of the experience, a meal before or after, drink in the interval, etc., are very important. They will also need the added value that a live concert offers over a recording to be spelled out clearly.

Above all, people want an experience they believe will be in some way enjoyable. This means that the perceived ‘risks’ involved in a new experience – and probably an experience they are trying instead of something more familiar and thus reliable – must, as far as possible, be addressed.

Although the actual cost of tickets may not in reality prevent attendance, if your target market perceives a high level of risk involved in attending, carefully targeted price reductions can help to overcome barriers.

If the first concert experience also means the first visit to a venue, potential attenders will need to be convinced that it is a good place for an evening out and be sure that they can get to and from it (including parking) with ease. They may also have fears about the ‘etiquette’ of concert-going, or about the sort of people who will be there, which need allaying.

Clearly the biggest part of the experience is the music itself. Potential attenders are unlikely to take the ‘risk’ unless they are familiar with at least some of the music to be performed (their ‘guarantee’ of enjoyment). Unless the soloist or conductor is a superstar, the names of the artists – or the ensemble – are unlikely to offer the guarantee they do to more experienced concert-goers. Repertoire is the most important factor in

decisions to attend concerts for the majority of current attenders, but the mention of even the most 'mainstream' repertoire may mean little to infrequent or potential attenders.

Despite this, many potential attenders are open to finding out more about classical music and developing their knowledge and tastes. Information about the music to be performed (as well as the venue and other elements of the experience) is therefore vital. But it must be the right amount of information and it must be expressed in a way that is accessible and relevant to your particular target market – and that might mean explaining what a Beethoven symphony is like.

### **How do we reach them?**

As the research on page 39 suggests, potential attenders are not willing to spend lots of time in their information search about potential 'evenings out'. They want the information to 'come to them', as it were. Potential attenders are therefore more likely to look for information in the 'broadcast' media – principally newspapers and magazines, although they would prefer us to advertise on television – rather than the brochures and leaflets used by current attenders.

'Broadcast' (as opposed to 'narrowcast') refers to media which allow you to communicate with large numbers of people at the same time (television, radio, national press), but which for that reason do not offer precise targeting. They also contain many other messages and tend to have a shorter 'shelf-life' and thus less 'impact' than, for example, direct mail. Broadcast media are therefore best suited to simple messages directed at broad market segments. Since promoting a classical concert more often than not means communicating a complex message to a 'niche' market, such media are rarely as cost-effective as more direct media.

One of the implications of this is that although radio advertising may seem the obvious medium for communicating an aural experience, it may not be the most effective.

Extensive advertising campaigns to attract new attenders are probably beyond the means of most people reading this and so other approaches are necessary (although it might be worth remembering that potential attenders are more likely to be your targets when writing and designing any press advertisement).

Sales promotions are, in effect, free (or nearly free) advertising. Reader-offers in national media publications (especially a number in the *Sunday Times* in the late 1980s) have had an enormous impact on several orchestras' attendances, and, in some cases, generated an entire subscriber base from scratch. In recent years, however, newspapers have become far more hard-nosed about the exchange of benefits and what they get in return, in terms of benefits to readers and as sponsors. The only other point to make is that, of course, there are many other types of sales promotion partner: shops, book clubs, even banks and, perhaps most interestingly, Internet shopping sites, may be willing to allow you to communicate with their customers with an offer that enhances their customer benefits.

Although the 'broadcast' media are where potential attenders would expect to find information, one of the most effective ways to encourage first-time attendance has been found to be by communicating with people directly, by mail or telephone (but not yet by email). There are a variety of sources of contacts for targeting potential audiences directly. A number of companies maintain vast databases against which you can profile your current customers in order to find more like them. Several companies keep data on people who have completed questionnaires and it is possible to purchase lists of people who claim an interest in classical music, or listen to Classic FM, for example. Given the level of cross-over with other art-forms, the first port of call should probably be other local arts organisations (you may even be able to do this without any money changing hands).

### **Test Drive**

Test Drive is a widely used approach which uses direct marketing to encourage potential attenders to attend concerts (or theatre, or dance, or the visual arts) on a 'trial' basis.

As part of the New Audiences programme, the Arts Council of England [ACE] commissioned a set of guidelines for running a Test Drive Campaign<sup>40</sup>.

The guidelines identify three essential elements of Test Drive: that it introduces people to the arts for the first time; that the encouragement of first-time activity will be incentivised; and, most significantly, that the first attendance is seen as a springboard to building an ongoing relationship with people. Test Drive is not,

therefore, simply about enticing potential attenders with a cheap ticket. To be successful it requires people to be 'introduced' properly, given information in an accessible form which overcomes their perceived 'barriers' to attending and, most important of all, ensures that the experience they have at their first concert makes them want to come back for more.

The guidelines also, therefore, contain the following warning:

*Test Drive only works if an organisation already has in place audience development practices which will enable new customers to be nurtured after their first few visits. Test Drive is labour-intensive and takes huge organisational commitment – so it isn't for every organisation.*

Although the principles and ways of approaching it are the same, there are almost as many versions of Test Drive as organisations that have used it.

The City of Birmingham Symphony Orchestra [CBSO], for example, identified postcode sectors outside their normal catchment area and made an offer to local residents, via door to door leafleting, of free tickets and transport to a specific concert. A coach was organised to take them to the concert and they were accompanied by a member of CBSO staff who gave them an introduction on the way.

By contrast, the Scottish Chamber Orchestra [SCO] obtained lists of potential attenders from other local arts organisations (ballet and theatre) and mailed them a personalised letter offering best available seats for £5 for a choice of relatively popular concerts, with added value in the form of free programmes and interval drinks.

The ACE guidelines are very comprehensive and, whilst acknowledging that this is a developing area, set out a series of do's and don'ts for Test Drive, and a template for planning a Test Drive Campaign. This information won't be repeated here, but instead an extended case study, which provides a model approach, follows.

## **CASE STUDY: HALLÉ ORCHESTRA**

### **TEST DRIVE**

The Halle worked with their local Audience Development Agency, Arts About Manchester (AAM) to develop a 'model' Test Drive campaign which was funded as part of ACE's New Audiences Programme.

Research had pinpointed a large market with high consumption of broadcast/recorded classical music who were not attending live concerts and the scheme was devised to address that potential directly.

#### **Target Market**

Two contrasting market research methods were used to identify and follow up potential attenders, which increased the number of customer leads and allowed comparison of the response rates and cost per response of the different methods.

Method 1: This was based on postcode geography, using CACI's ACORN geo-demographic profiling data combined with TGI (BRMB's Target Group Index) to profile postcode sectors with a huge number of potential customers. These were compared with the existing customer database captured from past booking transactions. This comparison yielded a group of local postcode sectors with high potential where there should have been a high level of attendance, but for various reasons attendance was low.

Method 2: Profiled list building. A database of existing and potential arts attenders from other theatre, dance, cinema and art gallery lists was collated by AAM. Telemarketing was used to contact the profiled list leads.

A large potential market was identified: people for whom live concerts were not part of their usual routine, but who were not averse to the idea; people who were reluctant to pay for an experience they may not enjoy; people who enjoyed listening to classical music on CD and believed that the live concert would not match the quality; people who enjoyed classical music but had no peers who shared their enjoyment and were therefore reluctant to admit their interest; and people who were inexperienced and were concerned that the rest of the audience would know more than them, and that they wouldn't fit in.

#### **The Campaign**

Special promotional print was commissioned, including a door-drop direct mailer, welcome pack and letterhead, to give the campaign a specific branding reflecting not only the quality of the product and the standing of the Hallé but also to act as an attractive and appealing 'come on' to a potentially new market.

The scheme was intended to get potential customers to climb a 'ladder of loyalty', gradually changing them into the full-price audience. Each successive rung represented greater frequency of attendance, greater commitment, greater product knowledge and customer loyalty.

#### LEVEL ONE

An accessible programme to which potential attenders were given unsold seats free of charge. Three concerts, from the Sunday afternoon Matinee Series, all within a month of each other, were identified as being accessible, popular, 'easy listening' concerts.

Telemarketing was used to contact the profiled lists, which allowed AAM to screen the potential leads and ascertain their level of interest before making them the initial offer. It resulted in higher leads and therefore better response and retention. It also allowed strict control on the number of seats allocated to the scheme.

After the concert, all potential customers were contacted by telephone to gather qualitative feedback on their experience and interest in attending again. It yielded some very interesting suggestions for refining future campaigns, particularly with regard to ways in which first-time attenders could be made to feel more confident.

Postcode sectors which had been identified were mailed with a special piece of print. A mailer was used in a door-to-door drop inviting the postcode geography leads to claim their free tickets by telephoning the box office. This was effective in gaining responses, but it was difficult to predict or to control the number of responses, which resulted in the Level 1 offer becoming over-subscribed.

A Welcome Pack was given to each person at each of the first two concerts, with a voucher for discounted tickets to the second/third concert.

#### LEVEL TWO

Required some degree of financial commitment, such as two tickets for the price of one, four tickets for the price of two, or two concerts for the price of one.

A special two-concert package for two Hallé Summer Proms concerts was offered to the leads who had responded from the Level 1 offer. The offer was two concerts for the special package price of £6 per person. Non-respondents to the Level 2 offer were re-contacted by telemarketers to ascertain the reasons for non-response.

#### LEVEL THREE

Aimed to interest the customer in making a longer-term commitment such as a half price subscription package. The customer would ultimately move to become part of the main full-price audience.

#### Results

1,344 potential customers took up the offer and a further 115 were put on a reserve list. The response rate to the postcode geography leads was 6%, but the profiled list leads contacted by telemarketing resulted in a response of 42% and much greater success in getting them to take up further offers.

78% of leads expressed an interest in future attendance, although retention of the new audience can really only be measured in the long-term. There is some indication that a proportion of the leads are now booking independently.

The scheme has been continued since, as part of Arts About Manchester's Test Drive the Arts programme.

Contributor: Helen Dunnett, former Marketing Manager, Halle Orchestra



## Entry Points and Presentation Styles

One of the essential elements of Test Drive is that the concerts people are invited to as their first experience are accessible to them in terms of the repertoire to be performed.

The notion of identifying and promoting specific ‘points of entry’ is pursued in a 1987 publication *Waiting in the Wings*<sup>41</sup> where the authors suggest that:

*[an] arts organisation should designate specific Points-of-Entry each year, primarily from events scheduled for its regular season. Designating Points-of-Entry allows the organization to focus its promotional efforts and to be discriminating in introducing new people to its world through events that are the least intimidating or uncomfortable and the most likely to be happy, enjoyable initial experiences.*

They go on to point out that:

*If an arts organization is indiscriminating about the application of its single ticket promotion monies, it may unwittingly encourage new people to enter its world at places that are strange, difficult or disturbing to the uninitiated. Those experiences may actually become ‘points-of-exit’ that discourage people from returning.*

The key points here are the benefits to the organisation of concentrating efforts to persuade new attenders on specific concerts and the importance of ensuring that those concerts are appropriate for first-time attenders. This will probably mean using the most popular concerts, ones that will sell anyway. But if an organisation is to be serious about developing new audiences, ‘sacrificing’ easy-to-sell seats needs to be viewed as part of the investment required. An example of this approach was employed by the Huddersfield Contemporary Music Festival (see page 83).

This concept can be extended so that concerts are programmed specifically to act as entry points. Some organisations, for example Scottish Opera, have programmed introductory concerts, previewing repertoire to be performed during a forthcoming season.

Another approach to making specific concerts more accessible for first-timers is to change the style of presentation. A number of orchestras have experimented with alternative forms of presentation, including: presenting concerts in unusual venues, changing the orchestra’s dress, through lighting and slide shows to accompany performances, by using the conductor or a narrator to introduce the music and even developing concerts that are based around telling a story. Some orchestral musicians find it hard to understand that their role in a performance extends beyond simply playing the notes in front of them, and the theatricality of a concert can be enhanced by offering players basic training in ‘stage-craft’, for example, how to accept applause. Even very simple initiatives, such as ‘dressing’ the stage can make concert-going a more accessible and complete experience (and is it really necessary to have the house lights up during a concert?). Currently, the leading exponent of alternative presentation styles is the concert promoter, Raymond Gubbay. His concerts of Baroque music in period costumes by ‘candlelight-effect’, for example, sell out concert halls throughout the U.K. and his success in reaching a very wide audience through such approaches could be very instructive in other orchestras’ attempts to develop new audiences.

## People get People

Another way to find first-time attenders is to ask your existing audience to do so for you. Welsh National Opera’s research (page 33) found that no less than one-third of people’s first experiences of opera were as a result of being taken by someone else.

There are many approaches to ‘people-get-people’ schemes, the simplest being those whereby existing customers are asked to supply the names of others they feel might be interested (and are often offered an incentive for doing so) who are then mailed with an offer. The City of Birmingham Symphony Orchestra [CBSO] chose a more personal approach:

**CASE STUDY: CITY OF BIRMINGHAM SYMPHONY ORCHESTRA****AMBASSADOR SCHEME**

The City of Birmingham Symphony Orchestra is often referred to as one of the nation's greatest cultural ambassadors. But we realised that it needed its own regiment of Ambassadors to help secure the orchestra's long-term future.

Based on a people-get-people idea, the Patrons and Society Members were asked to organise parties of personal friends, or groups from golf clubs, churches, WI groups, etc., to attend concerts. Following a mailshot, potential Ambassadors were invited to an introductory evening, with live music, refreshments and briefing talks about the CBSO, its history, the idea behind the scheme and a list of answers to the kind of questions they might encounter, such as "How do we know when to clap?".

Sixteen Ambassadors were recruited and offered a 25% discount on normal ticket prices (just above the usual Group Booking rate) when bringing a party of ten or more, plus a free ticket for themselves. On arrival at the concert, the Ambassadors and their guests are shown to a private area where their complimentary programmes and pre-ordered drinks were available. Members of the orchestra and management joined them during the interval to answer questions, or just chat about their lives.

All guests were added to the mailing list, and given a further incentive to return in the form of a 20% discount card, lasting up to 11 months.

This scheme has had a massive response - within the first three months 400 new paying audience members were recruited, all of whom will be tracked carefully on the orchestra's database. Funding was secured from the Arts Council of England's New Audiences programme, so the costs of the pilot project to the orchestra were kept to an absolute minimum.

Although labour-intensive at present, it is hoped that, in time, current Ambassadors will take on more of the administration of the scheme and that a pyramid effect will take place, with current guests becoming Ambassadors themselves.

Contributor: Sarah Gee, Head of Marketing & Development, CBSO

### ***Beyond the first date – getting them back***

Despite the current focus on new audiences, there is evidence from a number of sources that attracting new attenders may not be as big a problem as keeping them. Venues as diverse as the West Yorkshire Playhouse in Leeds, and London’s South Bank Centre [SBC] are reporting large numbers of audiences who attend only once. The City of Birmingham Symphony Orchestra [CBSO] has analysed box office records and found that, in an average season, no less than 60% of single ticket bookers are new to their database and year-on-year only just over 20% of all single ticket bookers return to attend another concert.

It may not be as simple as this, of course. As noted in the previous section, it can be very difficult to define what a first-time attender is: in the CBSO’s case it may be that they regularly attend concerts by another orchestra. Alternatively, it may be that they are – as they see it – regular concert attenders, who do so very infrequently. As the TGI data<sup>14</sup> quoted on page 16 suggests, most people who currently attend concerts do so once a year or less often.

These observations point once again to the casual relationship that most people have with classical music and concert attendance. But this should still be a matter of concern, for two main reasons:

- It is a marketer’s rule of thumb that it costs, on average, at least five times as much to attract a new customer as to keep an existing one.
- As one marketer put it, the proof of the pudding is not in the tasting but in whether people return for a second helping. If we are in the business of selling remarkable experiences, it must be a matter of concern if people are apparently so indifferent about repeating them.

Of course, the main reason for people to want more will be the quality of the artistic experience they enjoy. However, as pointed out in Part One, the ‘product’ includes all elements of the ‘evening out’. As such, customer care is a critical part of the experience, and one that managers can and should address if they are to retain and develop audiences (the Arts Council of England [ACE] publishes a guide to customer care, *Paying Attention*<sup>42</sup>).

SBC’s research identified that around 60% of the people who attended concerts at the venue did so very infrequently, and fitted this profile of wanting an ‘evening out’ for which classical concerts were just one alternative. Their research defined this group as ‘Good Time Novices’ and by designing a strategy specifically targeted at the needs of this target segment they have been highly successful in encouraging re-attendance:

#### **CASE STUDY: SOUTH BANK CENTRE**

##### **SBC TARGETS THE ‘GOOD TIME NOVICE’**

Market research into its database of over 750,000 patron names revealed that there were four distinct types of audience for classical music at SBC (see page 23). The awareness of these groupings led them to analyse the promotional material and communication methods that were currently being applied to each group, to see whether what they were actually being sent (in terms of tone, content and presentation style) correlated with what they had indicated stimulated them to attend a concert.

Not unsurprisingly, they found that the bulk of promotional print concentrated on the ‘core audience’, or ‘Conservative Fanatics’, as the research termed them. These were people who were the cognoscenti amongst audience members and who had the highest awareness levels of a broad range of issues – from the histories of the orchestras/ensembles and artists performing to the works being performed. The promotional material that was being produced by promoters catered almost exclusively to this sector, thereby excluding infrequent attenders and newcomers, who were dissuaded by fear of ignorance or simply a lack of relevant information.

A campaign called VITAL was developed, which was geared towards the ‘Good Time Novices’ – those that came once or less per year and who demonstrated no loyalty to orchestra, performers or repertoire. These people had little in-depth knowledge about classical music and responded more to stimulants based on awareness of use of music on television, star names (e.g. Nigel Kennedy), the combination of a concert visit with a nice meal (the complete package) or simply the chance to try an evening of music using a special discount offer (two for the price of one), thus reducing the fear of wasting money on the unknown.

A leaflet was designed with a brief to be unlike any existing classical promotional material. A good selection of quotes about the emotional responses to live music from the research focus groups was included, along with the visual stimuli they suggested, in the overall imagery.

In all, six concerts were selected on the basis of their accessibility for new audiences. Two-for-one deals were offered for the events and promotional copy that was not at all elitist was produced, aimed at stimulants such as television use (referred to above). A reply paid postcard was included, to capture further information. The design was also incorporated into a London Underground poster campaign on 101 four-sheet sites across central London. The posters made reference to the leaflet and encouraged telephone response, as well as acting as a generic stimulus for classical music events at the Royal Festival Hall.

The brochure was mailed to 20,000 infrequent attendees from SBC's database and the response was staggering. All available 1,200 seats (under the offer) for the six featured concerts were sold, generating over £11,000 in income and some 850 postcards were returned requesting more information.

A brochure was developed for a second campaign in which SBC wanted to demonstrate that neglected members of the database could be encouraged to revisit. We identified them as being neglected because inevitably, their infrequent attendance history meant they were rarely selected for mailings and therefore their attendance levels continued to decline through lack of awareness of SBC events. This campaign (mailed to over 50,000 people) also demonstrated that the right message, sent to the right people, could dramatically increase response rates. In the second test there was an increase of £1,300 per 1,000 people mailed. In all tests using the VITAL leaflets, measurements were taken against monitored control groups.

The development of this campaign, and the ideas within it to target 'Good Time Novices', was supplemented by a range of other initiatives to target the other groups identified within the research. For 'Mainstream Stalwarts', an orchestral brochure was devised which acted as a concise listing of relevant concerts at SBC, focusing more on repertoire, soloists and the simple ease of having one reference guide for a season of concerts. For the 'New Modernists', SBC developed *Current*, a contemporary classical music guide which listed all relevant events as well as including background articles by composers and performers, aimed at breaking down barriers to new music performance. These initiatives have helped SBC to achieve 18-year high audience averages for classical music.

Contributor: Chris Denton, Marketing Manager, Classical Music, South Bank Centre

Buxton Opera House identified a similar problem to SBC, but developed a different approach, finding, like SBC, that many apparent 'one time only' attenders needed only to be approached in the right way – using a method of communication and offer that met their specific requirements – in order to prompt a return visit:

## CASE STUDY: BUXTON OPERA HOUSE

### TELEPROMPT

Buxton Opera House found that while it was able to attract first-time attenders, it was not so successful at keeping them. Their existing strategy addressed, as it were, the bottom and top rungs of the ladder - first time attenders with Test Drive, and regular attenders through a variety of loyalty schemes. But between these extremes they had few tools to develop irregular, one-off attenders.

They identified a target group of 7,000 patrons who had booked only once, but not in the last 12 months, and had spent less than £60. Their objective was to prompt these one-off attenders to return and to keep prompting and encouraging them until they reached their optimum frequency of attendance.

Three reasons were identified for these attenders to have 'lapsed': first, existing print, press advertising and editorial, direct mail etc wasn't persuasive enough to make patrons re-book; second, they tended to be reactive, passive consumers; and third, they were not buying into the continuing relationship with the Opera House.

The solution they devised was a scheme with the following attributes:

- Personal contact to prompt action, and use of the telephone to build a more personal relationship with these customers;
- Offering a personal and tailored information service about what was on at the theatre, what facilities the theatre had to offer, information about transport, parking, booking, catering, and so on;

- An extremely soft-sell approach, with absolutely no obligation to buy tickets or make bookings on the telephone, but with the aim of prompting action after receiving show information on the telephone, and through the post; and
- Offering regular contact by calling every three to four months to give advance highlights of each season.

Rather than waiting for target attenders to phone the Opera House, they phoned them. A carefully-worded script ensured that patrons knew it was a free information service, and that there was no obligation to book. Detailed show information was given on areas of interest (drama, music, comedy, opera, etc) via a call sheet on a computer screen. A follow-up mailing with a personalised letter, booking form, seating plan and brochure was sent to reinforce the verbal message given on the telephone and a special information sheet, *The Facts About the Show*, was developed, giving detailed information.

As a pilot, the response of a test group of 200 patrons was compared to a control group of the same number. 27% of the test group booked during the three month test period, buying tickets to a value of £2,400, compared to 6% of the control group who contributed just £250. The test scheme was managed in-house, involving one member of staff making calls for 6 hours each week and the total cost was £600.

The success of the pilot has allowed Buxton Opera House to roll out the scheme to the rest of the target group of 7,000 patrons and, assuming it continues to prove cost effective and of equal or more contribution to the box office income, TelePrompt will become an integral part of the future marketing strategy of the Opera House.

Contributor: Helen Dunnett, Marketing Manager, Buxton Opera House

### ***Increasing frequency of attendance***

This section is about current attenders and how they can be persuaded to attend more concerts. But if we look once again at frequencies of attendance, we can see that there are significant differences in behaviour and attitudes within this group. We need to be clear about whether we are trying to persuade someone who came to two concerts last year to come to three next year, someone who came to five to come to seven or someone who came to twenty concerts to attend twenty-four. There are no clear ‘watersheds’ in these frequencies of attendance, but different approaches will be required at different levels.

#### **Relationship Marketing**

The most powerful tool available to us in increasing frequency of attendance is the box office computer database. Because it stores patrons’ names and addresses with details of the concerts they attend it is possible to analyse their frequency of attendance (as well as what they attend, amongst other things) and to target them directly on the basis of that information.

The use of such database information encourages the concept of a ‘ladder of involvement’, referring to the number and range of concerts individuals can be persuaded to attend and thus their level of commitment to your organisation. Relationship marketing extends this concept by viewing the relationship that an organisation has with a customer as an appreciating asset: it is not only easier to retain customers by developing a relationship with them, but they are also more likely to attend concerts more often.

The simplest – and most obvious – way to think about relationship marketing is as an ordinary personal relationship. Over-familiarity can be damaging at an early stage of a relationship and demands cannot be made until a certain level of trust has been built up. Respect for the other’s position is also essential throughout the relationship, but, once established, the other party doing something for you can enhance the relationship (hence the way that the ladder of involvement is extended to include donations and practical help for an organisation).

#### **Subscription**

Although they didn’t know it, when Henry Wood and Ernest Newman were running subscription concerts at the Queen’s Hall in London at the beginning of the last century, they were employing the much more recent concept of relationship marketing. Although some view specific forms of subscription as ‘holy cows’, by viewing it in this way – as a relationship marketing strategy – subscription offers a wide variety of approaches to increasing frequency of attendance.

The ‘holy cow’ approach usually involves purchasing tickets long in advance for a set series of concerts across a season, often on a particular night of the week. The subscriber receives a discounted price and the opportunity to renew their subscription each year and retain their favoured seats (in the past, such subscriptions have been known almost to become ‘debentures’ which are handed down through families).

Such a model of subscription suits the needs of many frequent attenders at classical concerts: they are committed listeners (cf. Harris Research Centre research on page 38) for whom classical music plays an important part in their lives. As such, they are willing to stretch their musical tastes (although within individual boundaries), they are also probably older, with more time on their hands and control of their diaries, as well as the financial resources to make ‘investments’ of this nature.

Research into reasons for subscribing consistently shows the most important benefit is the ability to plan concert-going into a person’s social diary. Such subscribers enjoy the way their musical tastes may be stretched and, as a subsidiary benefit, the savings achieved. Their depth of musical appreciation also means that they are more attuned to the acoustic properties of concert halls and this, at least in part, accounts for the importance attached to retaining preferred seats.

The traditional model of subscription enjoyed a renaissance from the late 1970s thanks to the proselytising work of the American marketer, Danny Newman, and his book *Subscribe Now!*<sup>43</sup>. This approach is still highly successful in the United States and its application is discussed in detail in an Arts Council of England [ACE] report, *Where Now? – Theatre Subscription Selling in the 90s*<sup>44</sup>.

This 'traditional' model is, with little doubt, the most beneficial to organisations because of its relative simplicity to administer, its positive effect on cash-flow and, most importantly, the fact that subscribers are 'forced' to attend concerts they might not otherwise choose.

This lack of choice – in an age when consumers are constantly bombarded with ever more choice of so many products – may be a reason for the decline in the traditional subscriber base of many UK orchestras. The City of Birmingham Symphony Orchestra [CBSO], for example, enjoys very strong subscriber support but has had to find new approaches to address a long-term decline – over a period of almost ten years – in the number of subscribers willing to take out extended series subscriptions. Another important factor appears to be the increasing busy-ness of people's lives and their unwillingness to commit their diaries in advance.

Research commissioned by the Arts Council of Great Britain<sup>45</sup> into schemes to encourage attendance at performing arts amongst irregular attenders found that the majority rejected this type of scheme outright:

*This [fixed dates subscription] scheme was rejected in all groups, primarily on attitudinal grounds. While the level of discount at 20% to 30% was thought to be attractive, the nature of the scheme demanded a degree of commitment and forward planning which this sample was not prepared to make.*

*The fact of deciding which day of the week one wished to attend introduced a degree of organisation which detracted from theatre as a form of more or less spontaneously-decided entertainment.*

*"You can't commit yourself six months in advance that you want to go on a Friday night; that's far, far too long."*

Many orchestras have developed alternatives to subscription in order to address the changing needs of attenders, such as the Scottish Chamber Orchestra's [SCO's] 'Pick and Mix' subscription in Glasgow:

#### **CASE STUDY: SCOTTISH CHAMBER ORCHESTRA**

##### **FLEXIBLE SUBSCRIPTION SCHEME**

The SCO's concerts in Glasgow achieved record attendances in 1990 with the opening of the Royal Concert Hall and Glasgow's year as European City of Culture. However, the excitement of (and promotional resources available) that year masked a long-term decline in the SCO's subscriber base which was highlighted when the orchestra returned to its Glasgow base in the smaller City Hall.

At that time the SCO ran a 'fixed' subscription scheme of two equal series, on Wednesday and Friday nights. Subscriber numbers had been falling steadily for some years and, as a result, by 1993 attendances were at a record low and particularly poor for the Wednesday series. Since subscription formed over 50% of ticket sales, this was the area that most urgently needed a new approach.

A new, more flexible, subscription scheme was introduced which, instead of offering either all Wednesdays or Fridays or both, offered a free choice of all concerts subject to a minimum of five. Discounts started at 15% and were stepped at a series of thresholds up to a 30% discount for taking all sixteen concerts. In addition, a ticket exchange scheme was introduced – allowing subscribers to swap tickets for a different concert if a date became inconvenient – along with the opportunity to pay in instalments. Because of the flexibility of choice, subscribers could not, however, guarantee retaining their favourite seats, although those booking earliest for the most concerts were given first choice. The SCO also began a longer-term process of adjusting its schedules to reduce the number of concerts on a Wednesday and increase those on Fridays.

A vigorous new re-subscription campaign was introduced and took the form of mailing previous subscribers a personalised letter and personalised booking form with a season brochure twice during the two-month renewal period and following up any non-respondents with a phone call. Potential new subscribers were targeted using a database generated from box office records of previous attenders and mailed towards the end of the renewal period, to coincide with the announcement of the season in the press.

Within three years the decline in subscriber numbers had been reversed, through retention rates of over 80% and attracting new subscribers to the more open scheme. More surprisingly, by offering a free choice, the number of concerts each subscriber booked also increased. By the end of the 1990s the SCO had been able to increase the number of concerts it gave in Glasgow – virtually all on Friday nights – and was selling more tickets than it had ever done before.

Contributor: Tim Baker, former Marketing Director, Scottish Chamber Orchestra

A similar approach was adopted by English National Opera [ENO]. They changed their subscription offering from a fixed series in 1992 to offer a choice of operas, firstly with restrictions on dates and then, in 1996, introducing a completely free choice. Research undertaken that year suggested, however, that despite the changes to the structure of the scheme, its benefits were not appreciated by potential subscribers. The main reason for this was found to be the term 'subscription' itself, which had different – off-putting – connotations to the scheme actually on offer. They changed the name to reflect those benefits: 'Flexible Discount Scheme'. In the five years to 1998/9, ENO more than doubled its subscriber base.

There are, however, potentially off-putting features of such a flexible scheme. For potential subscribers, who may have less knowledge of repertoire, artists, etc., having to choose from a wide selection of concerts can be forbidding. The BBC Philharmonic offers its concerts as part of The Bridgewater Hall's generic (flexible) subscription scheme, but in seeking to attract new subscribers, they decided to put together specific packages that did the choosing for people:

### **CASE STUDY: BBC PHILHARMONIC**

#### **FIRST TIMERS**

The idea behind First Timers was to encourage new subscribers who hadn't made this commitment before, but had come to more than two concerts a year in previous seasons, to buy into a concert season.

The most difficult area of seats to sell, then priced at £19, were offered at a discounted rate (50% off), and the subscription package was chosen for the customers, making it as easy as possible for them to partake.

The main aims of First Timers were: to encourage more subscribers to the series and in that way gain more loyal customers; to sell the more difficult seats at the beginning of the season; and to provide a generous incentive for customers, who appreciate being offered something exclusive to them.

Benefits to the customer:

- A good seat, at a heavily discounted rate;
- Six concerts chosen for them, from a wide selection;
- A very simple booking form with a freepost envelope attached; and
- A feeling of exclusivity.

Benefits to the organisation

- Customers on a regular basis in seats that would be very difficult to sell;
- Access to loyal customers with whom regular contact is permissible;
- Data with which the organisation can work with in the future; and
- Improvement on subscription sales.

Customers were targeted on the basis that they had attended two or more BBC Philharmonic concerts in the last 12 months but not booked a subscription

They were then mailed with a First Timers brochure, direct mail letter, booking form and freepost envelope. The mailing was sent three or four weeks in advance of the season starting, so as to be sure that these customers were not going to take out a standard subscription, and to put a deadline on the offer to encourage an immediate response.

The leaflet was very simple, easy to read and understand, and based on the season design to bring continuity to the project.

Categorisation at the box office is straightforward and it was therefore easy to select customers the following season for another offer

Of the 1,000 customers mailed with this offer, 110 of them took it up, an 11% response. Each customer attends 6 concerts out of a series of 14 and 110 seats, many of which have previously been empty, were used.

Contributor: Amanda Dorr, Marketing Manager, BBC Philharmonic



### Increasing Frequency at Low Levels

At lower levels of attendance, the issues relating to increasing frequency are much the same as in the previous two sections about ‘first-time’ attenders and, as such, the case studies offered in that section could be substituted – or developed – here. Low frequency attenders exhibit very similar attitudes to potential attenders, most importantly a low level of engagement with classical music and a ‘menu’ of alternatives, which, in their view, can easily be substituted for a concert.

Case studies have not been forthcoming to illustrate approaches to increasing frequency of attendance at low levels, but Arts Council of Great Britain’s research<sup>46</sup> into schemes to encourage attendance at performing arts amongst irregular attenders has very practical suggestions. The research was amongst mainly theatre-goers, aged 35-54, who attended performing arts events four-eight times a year:

*In general terms this sample is not averse to the idea of going to the theatre more often; they enjoy the experience and would be relatively happy to repeat it more frequently.*

*However, persuading them to change their habits as they see them is not easy.*

*Theatre occupies a particular role in their lives. It is a relatively special event whose specialness as a particular kind of evening out would decrease in direct proportion to increasing frequency, in their perception.*

*They see regular theatre-goers as a quite different group of people, more serious about the theatre; they do not want to treat the experience too seriously.*

*There are wary of experimentation. The thought of sitting through a play which they discover they do not enjoy appals them; particularly because they are not frequent theatre-goers.*

*They treat theatre as a form of spontaneously-decided entertainment in so far as they can. Unless booking in advance is the only way they will be able to see a show they avoid doing this.*

*They are self-consciously not planners or organisers of their lives and they make excuses to avoid any long-term commitment, even of one night a month for the next three months. This again reflects the role of theatre in their lives; other forms of entertainment can be substituted.*

*The trigger to decision is almost always one specific play or show which they see advertised, reviewed or is recommended to them.*

The research tested seven different types of scheme for increasing frequency of attendance on the sample groups and found clear indications about the type of scheme that would be most suitable to infrequent attenders:

*To be successful in attracting purchase by the target market a scheme should attempt to marry together the following criteria:*

- *be production-led;*
- *maximise flexibility; and*
- *minimise commitment.*

*The most successful scheme is likely to be a voucher-based one in which they pay money for vouchers redeemable against more than one venue, for any seat on any date, and preferably with a wider currency in theatre related activities. They have an incentive to go to the theatre but do not feel committed, and because they feel they would probably have gone to the theatre in any case, they do not regard it as an expense.”*

*... It is important to recognise that these results would not necessarily be replicated among more regular theatre-goers who, by definition, are in a plurality among those who have responded positively to schemes.*

*In terms of presentation, such a scheme should:*

- *be personally addressed;*
- *be product led, preferably with a reference to past behaviour;*

- *contain an instant, simple call to action;*
- *depict the vouchers;*
- *allow for all payments to be made by credit card;*
- *avoid any mention of subscription; and*
- *a membership card adds cachet but is not essential.*

*... Concentrating on subscription-type schemes per se as a way of encouraging this type of attender to go to a particular theatre more frequently may not be the most effective marketing approach; rather than change their self-perceived behaviour the task is to encourage them to continue with their unplanned, uncommitted approach to theatre, but give them an incentive to go more often.*

## ***Extending the Core Audience***

Getting more people to attend concerts need not always be about persuading the unconverted. Many – perhaps a great many – potential attenders would like to attend (more) concerts and all that is required is for the opportunity to be presented and packaged in a different way or at a different time.

The growing potential offered by the ‘grey’ market is discussed on page 51. People who have retired are not constricted by work in the times that they can go out for entertainment. Indeed, one of the reasons often cited by older people for ‘lapsing’ as concert attenders is a reluctance to travel at night. Putting on concerts at times to suit different market segments can therefore release latent potential for increased concert attendances, as the City of Birmingham Symphony Orchestra [CBSO] has found:

### **CASE STUDY: CBSO**

#### **MATINEE CONCERTS**

The concept of matinee concerts was introduced at the CBSO during the orchestra’s 75<sup>th</sup> anniversary season (1995/96). Ongoing audience research had revealed a number of real or perceived problems and/or barriers to attendance at CBSO concerts, in particular:

- Personal security at night;
- Cost of concert-going; and
- Fear of unknown music/difficult programming.

In response to this, a series of five weekday afternoon concerts was devised, mainly comprising light, well-known classical music, and with a lower overall cost structure than evening performances. The target audience included retired people, schools/colleges, low-income groups and those who might not wish to ‘risk’ more money trying out classical music. The concerts were not available as part of the CBSO’s subscription season.

Sales over the first season averaged 87% and have remained high over the following three seasons. The format has changed slightly over the years: originally, the concerts lasted about 90 minutes without an interval, but now are closer in form to traditional concerts lasting around two hours, with an interval. Repertoire is similar, often repeating programmes being performed as an evening concert, either in Birmingham or elsewhere in England.

Contributor: Sarah Gee, Director of Marketing and Development, CBSO

Research by the Scottish Chamber Orchestra [SCO]<sup>21</sup> confirmed the impact of the arrival of children on people’s arts attendances. Of course, there is nothing new about ‘Family’ concerts, but the key point is that in order to attract families, it is necessary to understand the particular barriers to them attending and construct promotional packages that meet their specific needs. The BBC National Orchestra of Wales [BBC NOW] undertook research in developing a specific family ticket scheme:

### **CASE STUDY: BBC NATIONAL ORCHESTRA OF WALES**

#### **THE FAMILY TICKET SCHEME**

The BBC NOW’s Family Ticket scheme sprang out of the first piece of audience research undertaken by the orchestra following the appointment of its first Marketing Manager in 1993. Researchers asked BBC NOW concert-goers at what age they attended their first classical music concert. The results indicated that unless audience members had attended their first concert by the age of 11, they were unlikely to attend in later life.

BBC NOW had very few children attending its concerts. There was a general perception amongst parents that concert-goers in general did not approve of their children attending concerts, that children were considered too noisy and disruptive by both other concert goers and the radio producers who recorded the orchestra’s concerts for BBC Radio 3. In addition to this negative perception, the price of concert tickets hindered attendance: the costs of taking a family of four to a concert were considerable and even if parents decided to leave their children at home, a babysitter would have to be found and paid for.

However, the orchestra was determined to change this situation and encourage young families to attend its concerts not only as a long-term investment in its audience, but also to allow parents to continue their concert-going at a time in their life when attendance usually lapsed.

In 1994 the Family Ticket Scheme was launched, with features specially designed to address the existing barriers to attendance.

- The orchestra sets aside 50 seats at each venue on its tour especially for families. The seats are positioned close to exits for easy access and are chosen for their child-friendly sight lines.
- Two ticket prices are available and these are the same at every venue. The Family Tickets were priced at £7 for one adult and up to two children, and £12 for two adults and up to four children. The prices deliberately discriminated against concert-goers without children to encourage both parents and grandparents to bring their children and grandchildren with them when they attended. The tickets were also cheap enough to allow families to leave at the interval, if necessary, without incurring too great a financial loss.
- An information pack was sent to every family booker before the concert, which explained, in a non-patronising way, what happens at concerts, giving details on the standard orchestral dress, when to applaud, why there were so many microphones on stage, and so on.
- Programme notes written specially for children were sent to families in advance and were also included in the main concert programme. Not only did the notes contain child-friendly descriptions of the pieces performed, but also included activities for the children, both during and after the concert.
- To encourage repeat attendance, each child in the party was given a 'passport' which was stamped at the orchestra's information desk each time they attended a concert. When six stamps had been collected the child was entitled to a BBC NOW sweatshirt or T-shirt.

Details of the scheme were sent to members of BBC NOW's mailing list, music teachers and parent-teacher associations, as well as being included in both BBC NOW's and its venues' print. However, the scheme was taken up slowly at first - the orchestra persevered, and news of the scheme spread most effectively by word of mouth. Now demand for Family Tickets frequently exceeds supply at BBC NOW's concerts.

Contributor: Joanna Sigsworth, Marketing and Publicity Manager, BBC NOW

Another barrier that prevents many people from attending arts events is lack of availability in their local area and the distance they would have to travel to the nearest concert hall. Considerable work has been done to define the catchment area for a typical city-based venue. Although some arts organisations, including orchestras, do attract visitors from significantly further afield, the maximum distance that most are prepared to travel for an arts event can be defined by a 45-minute 'drivetime' from any given urban centre.

Clearly this definition excludes any number of smaller towns and rural areas. One approach to meeting this inaccessible market is small-scale touring, taking concerts to those areas. However, in trying to make the major concert venues accessible to more distant potential attenders, many orchestras have developed group-booking schemes, which bring people together to share travel costs, typically using coaches.

There are a number of other advantages to this approach. Such a group scheme also overcomes concerns about travelling into a city centre at night, which are such a significant barrier to older people attending concerts. Developing group schemes also requires identifying individual organisers who, in effect, become 'ambassadors' – an on-the-ground sales force – for an organisation.

**CASE STUDY: HALLE ORCHESTRA****OPUS GROUPS**

The Hallé, in common with many orchestras, has always had specific series of concerts designed for group audiences. These have changed over time, but started as the Hallé Industrial concerts, which were performed in pairs. Due to popular demand a third concert was added, and the series became known as the Hallé Opus One Concerts, performed three times in a week, eight times a season.

The Hallé Opus concerts have become central to the orchestra's long term programming and marketing strategy. To perform the same programme in the same venue three times a week, with the usual (and often high) associated costs, requires each programme to sell an average of around 5,500 seats.

The promotional structure of Opus Concerts allows for quite generous discounts, the bigger the group, the bigger the discount, up to groups of 50 or more who get 30% off the standard price. Discounts are available in all areas, including the cheapest. The basic price of each Opus concert is slightly lower than the other series that the Hallé promote. The emphasis throughout is on quality and value for money.

A typical Opus programme would comprise a basic overture-concerto-symphony structure. A soloist is usually featured in at least five of the eight programmes. Lack of soloists in a season, as with unfamiliar works or composers, are soon spotted, and have a direct effect on advance sales (see below).

Each Opus Group (regardless of size) has a Group Leader. This is the person who actually makes the bookings, chases up payments, talks to the box office, and to whom the Hallé talks when the season is being announced or when additional support is required.

Opus Groups are exemplars of relationship marketing. There are only 114 Opus Group Leaders in total. Each lead a group of anything from 10 to 150 people, who have regular seats in either the Wednesday, Thursday or Sunday Opus concerts. In any Opus Sunday concert, for example, around 70% of the audience are members of Opus Groups, but only around 40 of them are Group Leaders. This makes communication easy, and means that a small amount of marketing investment can go a very long way indeed.

Unsurprisingly, a lot of attention is paid to Opus Group Leaders. A special reception is held in advance of the launch of the new season to let them have all the new programmes and price details. A dedicated (in every sense) member of the box office team looks after all the Group Leaders. Everyone - box office, Group Leader, marketing team - is on first name terms, and their value to the Hallé is obvious.

The return is obvious. In the 1999/2000 season every Opus concert, 24 in total, had between 68% and 74% advance sales three months before the start of the season. The subsequent marketing investment required from then on is minimal, if carefully placed, leaving resources free for the more bizarre ventures presented by the artistic planning team.

So what can go wrong? Everything. This is a very sensitive audience that fits a very specific profile. They appreciate going to concerts on the same day, evenly spaced throughout the season. Their other social arrangements are built around that fact. They will invest loyalty and advance payments in return for clear transport arrangements (made by the Group Leader) and an enjoyable musical experience.

However, the sensitivity of this audience goes beyond these areas. The slightest move into unfamiliar programming (of any piece, not just the main symphony), any change to the discount structure (something they particularly prize) and what would be considered 'unreasonable' price hikes will have, as we have discovered in previous seasons, a major effect. People will leave groups, choosing to cherry-pick fewer concerts, groups are sometimes forced to merge, which will have a negative effect on the average ticket price (they get higher discounts), and they are very difficult to get back into the fold.

The rewards are there to be taken, but beware, give these people what they like. They like what they know.

Contributor: Andy Ryans, Marketing Director, Hallé Orchestra

This case study from the Hallé orchestra refers to their separate 'Industrial' series and similar approaches have, historically, been used by a number of orchestras. For many years the London Philharmonic Orchestra [LPO] offered a separate 'Classics for Pleasure' series, but, more recently, has extended the concept so that it

now programmes five distinct concert series in response to the tastes and attitudes of different market segments:

#### CASE STUDY: LONDON PHILHARMONIC ORCHESTRA

The LPO performs over 40 concerts at the Royal Festival Hall between September and May, which are divided into distinct series:

- The **International Series** features distinguished conductors and repertoire, ranging from medieval works through well-known classics of the 19th and 20th centuries to the finest contemporary music. The concert experience is enhanced by stimulating and entertaining pre-concert events. In 1999, the LPO appointed Henri Dutilleux to the post of Composer in Focus. This allows audiences to develop a knowledge of one particular contemporary composer's works. Henri Dutilleux has attended each concert featuring his music and has also taken part in the pre-concert events.
- The season also includes a short themed **Festival** which creates an identity for a smaller group of concerts.
- The **Friday Series** offers an easy-going start to the weekend, with Friday night concerts featuring music drawn from a more familiar repertoire. In 2000, the Audience Request initiative invited concert-goers to select one of the items to be performed by the orchestra.
- **Silver Screen Classics** presents two annual screenings of classic films combining the drama of cinema with the excitement of live music on stage. The scores are performed by the LPO conducted by Carl Davis.
- **Roots: Classical Fusions** features encounters with great musical traditions beyond Europe. The 2000 all-day event focused on rhythm. The evening concert linked ritual dances from Kerala, southern India, with Tippett's *Ritual Dances*. The origins of the bolero were explored by Evelyn Glennie and world music players, highlighting the influences on Ravel's own *Bolero*.
- **London FUNharmonics** presents *A Rough Guide to Musical Instruments* for family audiences with Children's TV presenter Chris Jarvis. The music is bite-sized and the atmosphere informal. SoundStart, a new initiative providing first time concert-goers with discounted tickets for this series, has been made possible by support from the Paul Hamlyn Foundation.
- **Schools' concerts** provide the culmination of a term's workshops and lessons on a chosen theme for pupils from schools throughout London and the Home Counties. Designed for different age ranges, the LPO offers five schools' concerts in a season as well as three **family concerts**, all of which tend to sell out.

The LPO's core subscription audience makes up between 30% and 50% of the Royal Festival Hall on a concert night, depending on the concert series, but the variety of the seven different series offers an increased number of access and selling points, and enables marketing to build audiences.

In addition to marketing to core classical audiences via direct mail, sales promotions, distribution, advertising and publicity, programmes are frequently promoted to potential audiences by emphasising an element in the programme which may not necessarily be associated with classical music. The variety of the programme content allows the definition of potential attenders to be widened beyond the standard classical music concert-goer.

For example, the Roots: Classical Fusions series is promoted as an event where 'world music meets symphony orchestra'. In the 1999/2000 season, free daytime events were offered based on rhythm, culminating in a performance which included music by the Huelgas Ensemble, an Arabo-Andalucian singer and ritual dances from Southern India. This allowed the orchestra to target the SBC world music list of over 5,000 names, local and Asian communities as well as the more traditional direct mail targets of previous attenders.

Other series in the season enable more obvious targeting. The Silver Screen Classics series is promoted to cinema-goers and film enthusiasts. Within more traditional classical fare, the LPO programme has featured narrators or speakers including Simon Callow, Sam West and Sara Kestelman, which has enabled the LPO to link up with theatre productions. The Friday Series – Classics for Pleasure programme has a wide appeal and can be used as an introduction to the LPO and classical music, and has been advertised on Classic FM. Special under-15s discounts are promoted to schools and family concerts' concert-goers with the aim of encouraging attendance at the LPO's Friday Series – Classics for Pleasure concerts.

The diversity of the LPO programme caters for all kinds of audiences - the music aficionado, the music debutante and even very young children. The breadth of the LPO season is a strength and presents marketing with a genuine opportunity to build new audiences and forge new relationships.

Contributor: Jacqueline Barsoux, Marketing Manager, London Philharmonic Orchestra

## ***Developing tastes / repertoire***

As pointed out in the introduction to this section, one of the key things that marks out arts organisations from commercial organisations is our range of different objectives and, in particular, the artistic objectives which are central to most orchestras. As such, a commercial marketing approach – find out what they want and give it to them – is just not appropriate. Whether it be for reasons of artistic integrity, a desire to continually develop the art-form, or through straightforward educational motives, arts organisations seek to develop the knowledge and tastes of their audiences and the public at large. Alongside getting people to come to (more) concerts, therefore, a key objective of audience development relates to what it is they come to see.

Virtually all research on the subject is clear, firstly, that repertoire is the critical factor in concert goers' decision to attend and, secondly, that most current and potential audiences are inherently conservative in the choice of repertoire that will motivate them. The reason for this is also clear: when someone makes a decision about what to do for an 'evening out', they do so in the context of limited resources of time and money and the alternatives on offer. In making their choice, they will therefore seek to reduce the 'risk' that the event they choose might not be in some way enjoyable.

For most potential attenders, classical music is simply not important enough to take any risk at all; they want a guarantee of a relaxing and enjoyable evening out. They will seek only repertoire that they know will fulfil these criteria and if that can't be found they will do something else, such as go out for a meal or watch a video.

### **Programming to Reduce Perceived Risk**

Other people may be willing to take some risk, possibly one item within a concert, as long as they have some guarantee that there is something they know they will enjoy. For such people, any concert needs one 'hook', a reason for attending that concert, be that a popular major work or a distinguished conductor or soloist.

Themed music festivals take this idea further by generating interest and excitement around an idea, to create something that's more than the sum of its parts. This linking together of concerts around a theme has strong marketing advantages as well in that it allows greater investment in promotion (design, etc.) of a single persuasive message, or 'proposition' (one of the main difficulties of marketing classical music is that it is rarely cost-effective to invest resources in promoting the particular proposition offered by individual concerts).

There are many examples of successful 'themed' festivals – often involving collaborations between different organisations and programming across other artforms – creating interest in, and attendance at, concert programmes which, on their own, would not have appealed to such a wide audience. Since the mid-1980s, the London Symphony Orchestra [LSO] has pioneered such projects.

#### **CASE STUDY: LONDON SYMPHONY ORCHESTRA**

##### **FESTIVALS**

Successful themed music festivals should include:

- A major and courageous statement;
- Simple, clear and strong concepts;
- If possible, the introduction of the unknown or less well-known to create a 'journey of discovery';
- Musical ideas as the driving force – no formulae; and
- The key performer should have clear, strong identification with the central composer or idea and be a recognised and respected exponent.

Some examples of festivals that have worked well for the LSO include:

- **Mahler, Vienna and the 20<sup>th</sup> Century:** Mahler, his Vienna context (Berg, Schoenberg, etc.) and the tracing of his influence on contemporary music/composers. With Claudio Abbado.



- **Shostakovich: Music from the Flames:** a chronological journey through all of Shostakovich's music, all the symphonies, concerti and other music (film, jazz, etc.). With Mstislav Rostropovich.
- **Tippett: Visions of Paradise:** a major Tippett work in each programme, placed in the context of music that influenced and meant most to him. With Sir Colin Davis.
- **Mozart/Bruckner Series:** a Bruckner cycle paired with Mozart concerti and symphonies, creating a contrast (both musically and in length) between the two composers. With Sir Colin Davis.

Some that haven't been so successful include:

- Childhood: music for children or by youthful composers. A nebulous and not very exciting concept.
- Late works: not all late works represent a composer's peak or have any equivalence as a statement.
- Most 'national' festivals: almost no nation has one single style or culture.

Contributor: Clive Gillinson, Managing Director, London Symphony Orchestra

### Developing Trust

One way of overcoming perceived risk is by developing a bond of trust between an audience and an organisation or individual. In marketing terms, this is what is known as creating a 'brand': a distinct personality for your organisation which means that people will think of you first in connection with a particular product or service and, where they are buying something new, create sufficient trust to overcome any perception of risk. Richard Branson's Virgin brand has always been one of the best examples, although his problems with rail services illustrate just how careful you have to be to protect your brand 'values'.

In essence, developing a strong brand is about creating a relationship between an organisation and its customers. Perhaps the best example of this phenomenon in classical music is the relationship Sir Simon Rattle developed with concert-goers in Birmingham, whereby people who wouldn't ordinarily be prepared to take a risk with unknown repertoire would think that "If Simon says it's good, I'll give it a go".

One of the essential features of this approach is that developing trust cannot be achieved overnight. Nor can the pace of a relationship be forced. Although each individual will have a different starting point – in terms of their knowledge and attitudes – the development of a relationship with them should be viewed as a gradual journey to the point where sufficient trust exists to encourage the taking of risks.

In this context, the concept of entry-point programming is important for first-time attenders (discussed above on page 61, with an example, below), but so, too, is retaining interim points for others further on the journey.

### Information and Education

Research by Radio 3<sup>47</sup> identified a significant number of potential listeners who 'want to know more' about classical music. There are certainly large numbers of people who actively seek to develop their knowledge of repertoire (or any number of other subjects) on an intellectual level, but by accumulation, using their current knowledge as a reference point to strike off into new territory.

Andrew McIntyre points to the way the wine industry has, over a period of twenty years, succeeded in demystifying wine for a larger proportion of the population. One of the ways they have achieved this is by identifying the key features of wine and coming up with a 'points' system based on, for example, how dry it is as well as suggesting what sort of occasion or meal it would suit best. In the same way, Classic FM have, on their own record label, come up with a classification system (the Classic FM Mood Guide) that allows people to identify what they like about one work in order to make judgements about something with which they are unfamiliar, scoring repertoire according to how romantic, soothing, uplifting, exhilarating, or joyful it is.

Of course, there are many other ways to make new or unfamiliar repertoire more accessible by providing information: carefully targeted text in season brochures, concert programmes and pre-concert talks. Creative use of some of these approaches is illustrated in the case study from BBC National Orchestra of Wales, on page 77.

The LSO has developed a series of Discovery concerts, which aim to introduce people to new or unfamiliar repertoire in far more depth.

#### **CASE STUDY: LONDON SYMPHONY ORCHESTRA**

##### **DISCOVERY CONCERTS**

The LSO's Discovery concerts aim to encourage a greater understanding and enjoyment of unfamiliar music by giving audiences an insight into the works themselves, letting people 'hear music with new ears'.

The first half of a Discovery concert introduces the musical structure, themes and orchestration of a work through a carefully-written script which is illustrated by examples using individual players and orchestra sections, as well as the whole orchestra. In the second half, the work is played through complete.

Discovery concerts are linked to concerts in the season – often part of a themed series – and thus allow opportunities for packaging special offers. The main season Discovery concerts are presented by the conductors themselves and their personality and communication skills are vital ingredients of their success. In the 1999/2000 season, Ricardo Chailly presented Stravinsky's *Rite of Spring* and Pierre Boulez gave two Discovery concerts, of Berg's *Three Pieces* and a new work by Olga Neuwirth, and of Stravinsky's *Petrushka*, as part of his Boulez 2000 series. These concerts are targeted mainly at existing concert-goers, but specific print is produced and distributed widely to encourage newcomers as well.

The LSO also presents Discovery concerts for families on Sunday afternoons. Richard McNicol, the LSO Music Animator, introduces and conducts these concerts, again with the full orchestra. LSO Discovery Family Concerts are usually based on a musical theme, and include a variety of shorter works or movements that are, again, introduced and dissected before being played through complete. Before the concerts, families can attend a workshop to write their own music and during the concert, children and parents are invited to join in. In the interval, LSO players fill the foyers to demonstrate at first-hand how their instruments work. These concerts are aimed at 7-12 year olds and their parents, and are marketed to a developing family concert database as well as via schools and education projects in the local community.

Contributor: Karen Cardy, Head of Marketing, London Symphony Orchestra

For some people, lacking the appropriate vocabulary to discuss their reactions to music can create a barrier to enjoyment through fear of their ignorance being exposed. People are not confident about their own reactions to music and this can create barriers to enjoyment. The Edinburgh International Festival recognised this issue in developing a project aimed at encouraging people to develop their listening skills and the confidence in their own reactions to music.

The Festival's Connecting to Music project delivered a rolling programme of workshops in primary and secondary schools and adult evening courses through the University of Edinburgh. Whilst inventing and performing are being more than adequately provided for in the school curriculum and through music education projects, listening is not. The project aimed to teach and value listening as a participative activity and musical ability, in the same way that performing and inventing is valued.

Their starting point was that pre-conceptions about 'high' art, and in this case western art music (or classical music), predominantly derive from conditioning and class orientation, and not direct experience. When we experience music directly, and free ourselves from our barriers to listening, we can experience a connection to what is unfolding through the music which can often be experienced as deeply profound, nourishing and, ultimately, human.

They aimed through the project to break down the false pre-conceptions often held about classical music and introduce it to a wider audience by encouraging listening as a participative and a musical ability: developing listening skills, exploring an experiential approach to listening, and validating the listener's personal response to music.

## ***Developing audiences for contemporary music***

Research into contemporary music audiences identifies two main groups of current attenders: the intellectual, who are keen to expand their musical repertoire by moving forward from an existing base of knowledge, and the risk-takers, who seek new and challenging experiences from a wide range of contemporary arts. What both groups have in common is a very active involvement in the arts – it is a very important part of their lives.

However, there are relatively few of these people, and in seeking to develop new audiences the research identifies two groups of potential attenders; people who enjoy classical music and may be open to experimentation, and people who enjoy experimentation but do not have experience of classical music. Both of these groups are, again, likely to have an active interest in the arts, but also share a lack of theoretical knowledge that undermines their confidence in exploring new repertoire.

A number of barriers to potential attendance are identified, the first being perceptions and terminology – in essence, classical music attenders who are put off by the challenge of the ‘contemporary’ and ‘experimenters’ who are put off by the perceived conventions and elitism of classical music – which are emphasised by perceptions and expectations of venues. Although not necessarily a barrier to the committed, price can play a part when potential attenders are being asked to take what they see as a major risk.

One of the key barriers, however, is the way that information about contemporary music is communicated to potential attenders. This is one of the main points made by Heather Maitland in *Is it Time for Plan B?*<sup>48</sup>. She suggests that Plan B is not necessary because, when properly executed, Plan A – using the available research to identify and carefully target potential attenders before communicating the benefits offered by the experience in clear and understandable language – is still effective for developing audiences for contemporary music.

Three case studies, illustrating this point in different ways, are set out below.

### **CASE STUDY: CAMBRIDGE CORN EXCHANGE**

#### **FAST FORWARD**

In November 1993, the Kronos Quartet played the Cambridge Corn Exchange, attracting over 800 people to the venue’s first contemporary classical music event.

In Spring 1999, the Fast Forward season attracted over 18,000 people to 24 performances of new music and drama, contemporary dance and ballet.

Since 1993, the Cambridge Corn Exchange has developed Fast Forward, a pioneering audience development project to programme new music and to create and nurture an audience for new work.

The reasons behind the project were:

- a motivation to encourage the existing Corn Exchange audiences to experiment by attending unfamiliar work and to cross-over to different art-forms;
- the fact that the audience for conventional classical music concerts was in decline and new audiences or new music, or both, had to be sought; and
- the realisation that programming new music within conventional programmes was counter-productive as it did not attract new audiences and did nothing for the regular audience.

The early stages of the project focused on creating a database of actual and potential new music attenders, by selecting attenders from previous similar events and combining lists from all venues in Cambridge presenting new music and drama. This was complemented by targeted mailshots to likely suspects, such as contemporary dance and modern art lists. Print was very carefully designed and written.

These activities were reasonably successful in raising the profile of new music, attracting first time attenders, increasing frequency of attendance, and establishing the Fast Forward database and brand.

However there was a basic flaw in the scheme - print cannot sing! To put it another way, we were trying to sell people music that they had not heard, with a piece of print.

At this crucial moment, two important things happened. Firstly, the Arts Council of England offered the venue three-year Promoter Development Funding to support Fast Forward. Secondly, the Britten Sinfonia chamber orchestra started discussing innovative programming based around the music of Frank Zappa. The result was that the Corn Exchange was able to create programming for their target audience and also had the resources to produce a CD sampler to play the new music being programmed to that audience.

The results were quite amazing:

- Fast Forward Spring Season 1998 attracted over 3,000 people (88% capacity);
- 38% were Corn Exchange rock/comedy attenders crossing-over to new music for the first time;
- 34% were completely new attenders; and
- frequency of attendance by previous Fast Forward attenders increased by 47%.

The success of the CD led to the Corn Exchange receiving one of the first New Audiences fund awards towards the production of a Fast Forward CD-ROM. This focused on a much wider range of new work - new music and drama, contemporary dance and ballet - and had sound clips, video clips from shows, interviews with performers, as well as background educational material. It also included information on the venue and its staff, plus a virtual tour of the building. It was targeted at the Fast Forward database but also, significantly, at every 14-18 year old at school in Cambridge, each of whom was sent a copy.

The results were even more amazing:

- Fast Forward Spring Season 1999 attracted over 18,000 people (75% capacity);
- 64% were Corn Exchange attenders crossing-over to new music for the first time;
- 24% were completely new attenders;
- frequency of attendance by Fast Forward attenders increased by 30%; and
- 8% were school pupils/teachers/students.

The big question is where does Fast Forward go now? The Corn Exchange has completed its three-year Promoter Development funding and it cannot go back to New Audiences fund as they want new activity. This is not a whinge about money - it is more a question as to how new work and new audience development can be funded both strategically and in the long-term. It is not core activity, it is not new activity, it is not additional activity. It is essential, but has no clear funding policy and practices

This case study first appeared in *Arts Business*, Issue 40 (December 1999).

Contributors: Robert Sanderson, Director, and Margaret Levin, former Marketing Manager, Cambridge Corn Exchange

## CASE STUDY: BBC NATIONAL ORCHESTRA OF WALES

### NOW HEAR THIS

*"I learn from anything, albeit a little less from Schoenberg."*

A comment from a typical BBC National Orchestra of Wales [BBC NOW] customer encapsulates the key issue facing the orchestra at the beginning of 1996.

The orchestra had just announced the appointment of a new Principal Conductor, Mark Wigglesworth, in his late twenties and with a particular passion for 20th century music. Meanwhile, BBC NOW's public concert programming consisted primarily of late 19th and turn-of-the-century repertoire, and the orchestra's core audience was made up of traditional customers, predominantly over 45 with conservative tastes in classical music.

Faced with this divergence between artistic policy and existing audience, the orchestra's marketing team, led by Marketing Manager Cathi Marcus, decided to look beyond the boundaries of the existing audience and develop a new, 20th century music audience for the orchestra. In particular, it was decided to focus on younger people who would relate directly to a conductor of their own age and who, as market research conducted by BBC NOW had previously indicated, would have fewer negative preconceptions about 20th century music.

#### Objectives

- To establish Mark Wigglesworth as a dynamic, respected, well-known face on the Wales arts scene.
- To promote ticket sales for Mark Wigglesworth concerts at St. David's Hall, Cardiff, by denoting these as 'special' events.
- To reach a new audience, younger in age and potentially broader in musical taste, in order to provide a core listenership for more adventurous programming in the longer-term.

The NOW Hear This concept:

Mark Wigglesworth's six concerts at St. David's Hall were marketed entirely separately to the orchestra's standard concert series. As well as the obvious reference to BBC NOW's name, the NOW Hear This title was chosen to mark the series as dynamic and fresh, and, above all, to show concert-goers that their preconceptions would be challenged.

There was a single seat price for all areas of the concert hall. Audience members were encouraged to 'try out' different seating areas at each concert, and the programmes were free.

There were post-concert discussions, featuring the conductor, soloists and orchestral players, allowing audience members to learn more about the music being performed. In addition, programme notes were posted to customers in advance (series subscribers only).

#### Marketing Campaign

An extended press and PR campaign was put into place, to maximise national coverage, including a separate series launch and new 'sexy' photos of Mark Wigglesworth.

The print format and style was very distinct from existing BBC NOW print and included a separate CD case-sized subscription leaflet, postcards rather than flyers, and posters. Copy was deliberately emotive and non-technical, stressing the unique qualities of a live performance versus CD recordings. The brochure also contained instructions on how to get to the concert hall, how to find your seat once you were in the hall, and the opportunity to order pre-performance supper and interval drinks on the booking form. These features were all designed to demystify the concert-going experience for first-time attenders.

For the first time, the orchestra utilised advertising hoardings positioned by main roads into Cardiff and posters at main-line railway stations from Swansea through to Bristol. Posters and hoardings were up during March and September 1996. This coincided with BBC NOW's local press advertising campaign.

18,500 names were purchased from the Mosaic database, the target group being young graduates in their late 20s to early 30s with decent salaries, who collected CDs, who were curious about the arts in general and who lived in the South East of Wales and border area, from Cardiff to Bristol. This group was nick-named 'Sarah and James'.

From mid-March 'Sarah and James' were mailed with the series leaflet, together with an invitation to attend a

performance of Shostakovich's Fifth Symphony on 10 May free of charge to sample the orchestra and its new Principal Conductor (as long as they had not previously attended a BBC NOW concert). To avoid negative feedback, a letter was sent to customers who had already booked for the Shostakovich concert, explaining why the Orchestra had made the free ticket offer. A 5% return rate on the mailing was set.

During April a telesales campaign commenced, repeating the free ticket offer to selected areas of the Mosaic mailing. A cultivation evening was held at the Shostakovich concert. A team of 'meeters and greeters' were on hand to answer any questions from the first-time attenders. After the concert a free reception was held which Mark Wigglesworth and the evening's soloist attended, and at which the attenders could book their subscription to the series. All subscription bookers were entered into a prize draw.

From the end of May to the end of June, a second-stage telesales campaign commenced, to follow up those Shostakovich concert attenders who did not book their subscription on the night. In September the prize draw winners were chosen - a couple from Bristol who's names were Sarah and James!

From May to June the NOW Hear This leaflet was mailed to existing members of BBC NOW's mailing list, together with other selected mailing lists, inviting them to subscribe, and the leaflet was distributed to display racks throughout South Wales.

A single ticket sales campaign commenced in September at the end of the subscription series booking period, with distribution of postcards and posters, a direct mail campaign and repeats of both the special television trail, hoardings and railway station poster sites.

#### Results

A target of 400 subscribers to the NOW Hear This series was set at the beginning of the campaign and a total of 398 were recruited. 300 were from the 'Sarah and James' group and 44 were from BBC NOW's existing audience. The remaining 54 came from a new category of BBC NOW attender, nick-named 'Sarah and James' Parents', who were older, well educated and were from the English side of the border area.

BBC NOW developed a core audience of around 800 20th century music attenders at each concert through the subscription and single ticket campaigns.

Contributor: Joanna Sigsworth, Marketing Manager, BBC NOW

### **CASE STUDY: HUDDERSFIELD CONTEMPORARY MUSIC FESTIVAL**

#### **POINT OF ENTRY SCHEME**

Using the most recent research, Huddersfield Contemporary Music Festival recognised the main barrier to attracting new audiences to contemporary music was the fear of the unknown and the importance of publicity material which was non-threatening, warm and welcoming. They also recognised that the enormous number of choices presented in the full festival brochure could be overwhelming for potential attenders.

Eight (out of 65) highly visual and theatrical events – which research suggests are more accessible – were selected to be included in a special point of entry brochure. Key messages in the emotion-led copy and presentation were 'accessibility' and 'enjoyment'. The brochure cover featured just the word 'Festival' and the dates, to ensure maximum pick up/open up. Free outdoor events, films and workshops were also highlighted, together with details of puppetry and family concerts.

The brochure was mailed to local dance and theatre attenders, distributed in leaflet racks around the area and door-to-door distribution was targeted to key local postcode sectors. The local newspaper also ran a promotion for the same selection of events which reflected the tone of voice and message of the print.

A small discount was offered for each event in order to allow tracking of those responding to the point of entry brochure. Over 100 tickets were sold directly as a result of the brochure, but the success of the scheme should not be measured in terms of ticket sales alone. Distributing publicity of this type, which made less of the word 'contemporary' (research proves this to be a particularly challenging word) and stressed 'accessibility' was a vital step in re-positioning the festival in the minds of a number of other audiences, including local traditional arts attenders, local media, sponsors and funders.

Contributor: Maria Bota, former General Manager, Huddersfield Contemporary Music Festival

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