Takeaways from Slover Linett programming research

• Provides a common ground for Marketing and Artistic
• Finding the balance:
  ▫ Customer segments and preferences
  ▫ Product differentiation
  ▫ How much investment in tomorrow’s audience
  ▫ Enhancements *around* the concert or *in* the concert
  ▫ Enhancements with popular or contemporary rep
  ▫ Packaged or individual experiences
  ▫ Planning cycle vs. data cycle
Background

• Concert and series mix at Walt Disney Concert Hall
  ▫ 160+ concerts per year
    • 95 Los Angeles Philharmonic subscription concerts
    ➢ 15 Los Angeles Philharmonic concert series
    • Plus 12 Presentations series (classical, non-classical)
  • Orchestral series are curated by day of week, evenings and matinees
    ▫ Casual Fridays was only exception
Concert format examples

• Two new series (transformed two existing) in 2014/15 Season, before the research

1. in/SIGHT
   ▫ Multimedia series
   ▫ Targeted new, younger audiences
   ▫ Crossover into visual arts community
   ▫ Branded and bundled events that we wanted to do anyway

2. Inside the Music
   ▫ Educational series with a la carte enrichments surrounding the concert experience, young host Brian Lauritzen from KUSC
   ▫ Targeted infrequent attendees with goal to increase engagement and thus frequency
in/SIGHT
Inside the Music
What we learned (and are still learning)

• **in/SIGHT**
  - Contemporary, diverse programs make for an extremely varied series
  - Introducing a new format to existing subscribers can backfire
    - Renewal rates are way down for this series
    - But, is still attractive to new buyers (for 2015/16)
  - Hard to track combined impact of “visuals” on “audience building”
    - Millennials/GenEx favor crossover/visual experiences (PGI3)
    - 40% of single ticket buyers were brand new
    - Low satisfaction with music experience
  - One more season, then we’ll unbundle it and keep the brand to connect these types of programs
What we learned (and are still learning)

- **Inside the Music**
  - The programs selected were core and popular, therefore high attendance
  - High satisfaction, loved the host and pre/post talks
  - Measuring increased frequency among infrequent attendees is a long term project
  - On demand videos: 1/3 of audience viewed but not all the way through
    - We’re streamlining videos, less academic
  - Game: 1/5 of audience played
    - Getting rid of it, not worth it
  - High renewals for next season
What’s next for us

- Dig deeper into existing content tests to measure impact
- Looking at unbundling series to create more options and support non-subscription product differentiation and new buying models
- Implement talking from the stage
- Foster casual atmosphere
  - Our Casual Fridays series is still popular
  - More post-concert receptions, lounges
  - Pushing for updated amenities in Walt Disney Concert Hall
- Increase value (for the price) by adding on to concert experience
- Wallace Foundation grant to explore new concert formats
Finding the Balance: 
Artistic and Marketing Collaborations to Build New Audiences

Sarah Lee
League of American Orchestras 2015 Conference: Constituency Meeting
May 29, 2015
The road to this research

• LA Phil first engaged Slover Linett to conduct focus group research to explore reactions to marketing collateral in Summer 2014

• We found that current patrons love the LA Phil and are impressed by its marketing...

• ... but that non-patrons rarely engage with marketing materials about the LA Phil

  – In large part, because they think of classical music as boring, stuffy, and “not for me”
The road to this research

- Which raised questions like:
  - How can marketing help reshape perceptions of classical music if the target audience isn’t engaging with marketing?
  - How can artistic and marketing collaborate to shake up the classical music experience so that it becomes more approachable and appealing over time?
Programming research study

- Develop a deep and nuanced understanding of audiences’ programmatic preferences, with an eye toward developing a more differentiated set of offerings
  - What kind of enhancements encourage audiences to come more frequently, or to take a risk on unfamiliar repertoire?
  - What is the relative importance of programming and program enhancements in decision-making?
  - How can enhancements best be delivered in order to meet audience needs?
Programming research study

• Qualitative discussion groups
  - 6 groups, current audiences for classical programming at Walt Disney Concert Hall + inclined non-attenders
  - Used a “build-a-series” game to explore preferences for programming & experiential enhancements

• Online survey & segmentation model
  - Recent audiences for orchestral programming at WDCH (2011-12 through 2014-15 seasons) + high-potential non-patrons recruited through third-party panel
  - Used cluster analysis to identify psychographic segments
  - Concept testing questions for five specific enhancements
Concept testing

- Talking from the stage
- Festival-style atmosphere
- Visual enhancements
- Educational concerts
- Post-concert reception
Concept testing

- Openness to all concepts, with little variation across the concepts
  - And few major differences in responses between current audiences and non-patrons
- But most would attend a concert with the enhancement only if it were paired with a program of interest
Concept testing

Talking from the stage

<table>
<thead>
<tr>
<th></th>
<th>Patrons</th>
<th>Non-patrons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would seek out</td>
<td>29%</td>
<td>23%</td>
</tr>
<tr>
<td>Would be interested in</td>
<td>59%</td>
<td>68%</td>
</tr>
<tr>
<td>Would generally avoid</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Would never attend</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Bar chart showing the distribution of responses among patrons and non-patrons.
Concept testing

Festival-style atmosphere

- Patrons:
  - Would seek out: 21%
  - Would be interested in: 50%
  - Would generally avoid: 24%
  - Would never attend: 5%

- Non-patrons:
  - Would seek out: 25%
  - Would be interested in: 59%
  - Would generally avoid: 15%
  - Would never attend: 1%
Concept testing

Visual enhancements

<table>
<thead>
<tr>
<th>Patrons</th>
<th>Non-patrons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would seek out</td>
<td>17%</td>
</tr>
<tr>
<td>Would be interested in</td>
<td>54%</td>
</tr>
<tr>
<td>Would generally avoid</td>
<td>3%</td>
</tr>
<tr>
<td>Would never attend</td>
<td>2%</td>
</tr>
</tbody>
</table>
Concept testing

Educational concerts

- **Patrons**
  - Would seek out: 15%
  - Would be interested in: 56%
  - Would generally avoid: 25%
  - Would never attend: 4%

- **Non-patrons**
  - Would seek out: 14%
  - Would be interested in: 53%
  - Would generally avoid: 29%
  - Would never attend: 4%

Legend:
- Blue: Would seek out
- Green: Would be interested in
- Light yellow: Would generally avoid
- Orange: Would never attend
Concept testing

Post-concert reception

- Patrons
  - Would seek out: 12%
  - Would be interested in: 57%
  - Would generally avoid: 27%
  - Would never attend: 4%

- Non-patrons
  - Would seek out: 16%
  - Would be interested in: 58%
  - Would generally avoid: 23%
  - Would never attend: 3%

Legend:
- Would seek out
- Would be interested in
- Would generally avoid
- Would never attend
A Segmentation Model

Current patrons

- Traditionalists: 20%
- Best of the Best: Socials: 18%
- Best of the Best: Elegance Plus: 14%
- Open and Social: 21%
- Classically Adventurous: 19%
- Intimidated Newcomers: 8%

Non-patrons

- Traditionalists: 16%
- Best of the Best: Socials: 7%
- Best of the Best: Elegance Plus: 11%
- Open and Social: 38%
- Classically Adventurous: 7%
- Intimidated Newcomers: 8%
A Segmentation Model

- “Deepening engagement” segments
- 73% of current patron base, but only 41% of non-patrons
A Segmentation Model

- “Growth” segments
- 60% of culturally-active non-patron base, but only 27% of current patrons
Classically Adventurous

- Prefer novelty over familiarity; have a big appetite for new music and rarely-performed pieces
- Enthusiastic about learning more about the music; tend to prepare for performances and like to discuss what they’ve heard
- **To engage them:** Experiment with new formats—especially talking from the stage, visuals, and a festival-like format—in conjunction with new music, focusing on providing non-didactic ways to learn more about the music and artists.
Best of the Best

- Want the absolute best that classical music has to offer, and prefer artists and works that are familiar
- Socials are interested in meeting new people but are turned off by visual enhancements; Elegance Plus audiences love the beauty of the hall and see visual enhancements to be compatible with that beauty
- To engage them: Pair concerts featuring with well-known repertoire and famous composers with opportunities to socialize (for the Socials) or visual elements to enhance the music and animate the beauty of the hall (for the Elegance Plus sub-segment).
- Classical music “purists” who want a contemplative, aesthetic experience with the music
- Enjoy the traditional experience and are resistant to attempts to change that experience
- **To engage them:** Continue to program concerts in the traditional format, with some allowance for concerts that feature talking from the stage.
Open and Social

- The youngest segment and extremely social; think of arts attendance as an opportunity to meet new people and spend time with friends and family
- Want classical music experiences to be more casual, relaxed, and welcoming of newcomers
- To engage them: Create more opportunities that integrate social engagement with the music, including helping audience members to meet and connect with others like them in a casual setting.
Intimidated Newcomers

- Least knowledgeable about classical music and intimidated by the traditional classical music experience
- Want a more casual and relaxed atmosphere, and also sensitive to practical considerations
- To engage them: Actively infuse the everyday concert experience with a welcoming and relaxed atmosphere that begins to shift expectations about the live classical music experience.
Some open questions

- What are the opportunities to infuse the concert hall experience with a more comfortable, welcoming, and relaxed atmosphere?
  - How can we shift the everyday concert experience, in ways that would appeal to Intimidating Newcomers (and others), without alienating Traditionalists?

- What does it look like to truly integrate social experiences with the music?
Winter Subscription
Celebrity Specials
Christmas Concerts

Total = 89 Concerts
2009-10

new.
cleveland orchestra.

Inside: 
- Introduction
- Musically Speaking: Beyond the Score
- Severance Access For New Subscribers: $99
- Fridays@7 Jumpstart the Weekend
- Family Concerts New Generations
- Celebrity Series Out on the Town
- Staged Opera Mozart's Così fan tutte
November 29
DVORAK
NEW WORLD OF MUSIC
Dvořák’s “New World” Symphony No. 9
In 1892, Dvořák came to New York to help create a new kind of American musical language. He was intrigued by Native American drumming and African American spirituals. In the end, he used classical European forms to capture his experiences in a musical postcard home — a grand symphony “from the New World.”

January 10
TCHAIKOVSKY
FATE AND TRIUMPH
Tchaikovsky Symphony No. 4
The most shattering personal crisis of Tchaikovsky’s life — his ill-conceived marriage to a young student in 1877 — coincided with one of the greatest periods of his composing career, culminating in his Fourth Symphony, a 19th-century music drama to rival the literary masterpieces of Pushkin and Tolstoy.

March 7
WOLFGANG
MOZART THE MAN
Mozart “Haffner” Serenade
Next Spring at Severance Hall, Mozart will be the featured composer in several presentations. For this edition of “Musically Speaking,” the great Hollywood actor John de Lancie writes, produces, and presents a unique look at one of the greatest composers of all time. As a man, and as a creative musician.

MUSICALLY SPEAKING SERIES TICKETS (three-concert series)
$90 / $120 / $132 / $162 / $210
For seat location, seat availability, box seat prices, or to place an order, talk to Diane or Monica in the Subscription Office — email them at subscriptions@clevelandorchestra.com — or call them weekdays 9 to 5 at phone number 216-231-1111

Sundays at 3 p.m.
Musically Speaking
Beyond the Score®
Musically Speaking is made possible in part through the generous support of the William J. and Dorothy K. O’Neil Foundation.

Do you want the insider’s guide to music? The love story behind the concert? Do you want to hear the folk tunes that inspired the symphony? More insight into what you are hearing? Sign up for this series. You’ll listen to the masterpieces in a whole new way. In context.

Borrowing from the Chicago Symphony’s runaway hit “Beyond the Score,” the first half features the Orchestra and a richly textured audio-visual presentation about the composer and the piece to be performed (like the best of PBS).

In the second half, you’ll hear a full throttle performance of the work in its entirety made all the more vivid by your experience in the previous 45 minutes. Get the inside story behind the music, beyond the score.
March 2-4-6-8

Mozart

cosi fan tutte

It's a love story, very human, full of humor. "Cosi fan tutte" translates (more or less) as "Women Are Like That," but it's a commentary on all of us, men and women alike. It pushed the envelope in Mozart's day. Today it still pushes our buttons. Love is a hunger to satisfy. Jealousy is in all of us.

Last season, Mozart's "Marriage of Figaro" had a sold-out run at Severance Hall. Now we have the second installment of a three-part Mozart feast, conducted by Music Director Franz Welser-Möst. (It will conclude in 2011 with "Don Giovanni.") This new production of "Cosi fan tutte," which premiered in Zurich this past June, takes Severance Hall all the way into fully staged opera.

Why Opera? Clevelanders love it. Opera is costumes, lighting, drama, exciting music, mesmerizing singers, and real emotion. It is part of what great orchestras regularly do. Like the Vienna Philharmonic. Like The Cleveland Orchestra.
Three Concerts
for the price of Two.
For as little as $66.

November 7 Saturday at 8:00 p.m.
A SALUTE TO JOHN WILLIAMS

The music of John Williams is as much a part of Star Wars and Jaws as the actors are. Admit it—you get chills when you hear the theme from E.T., Jaws, or The Godfather. With music expert Richard Kaufman as he shares behind-the-scenes stories and leads the Cleveland Orchestra in Williams’s music from Jurassic Park, Indiana Jones, Star Wars, and more.

March 30 Tuesday at 8:00 p.m.
PINK MARTINI

Pink Martini is "a little orchestra" from Portland, Oregon. Steeped in jazz, Japanese pop, Italian film scores, and French cabaret, the orchestra sounds of these globe-trotting musicians come together with The Cleveland Orchestra for an unforgettable evening of fun. Straight up, shaken, and stirred.

April 24 Saturday at 8:00 p.m.
CHRIS BOTTI

Jazz trumpeter Chris Botti joins The Cleveland Orchestra for an evening blended between jazz, popular song, and classical hits, including encores and favorites from his PBS broadcast and Boston Pops performances. Gentle, soul-searching music intertwined with fun and clave.

CELEBRITY SERIES TICKETS (three-concert series)
$165 / $150 / $122 / $92
For information and availability, box seat prices, or to place an order, talk to Diane or Monica in the Subscription Office:
— call them weekdays 9 to 5 at phone number 216-231-1111
— or email them at subscriptions@clevelandorchestra.com
Fridays@7
An exciting new series of five Friday nights —
a Cleveland Orchestra concert plus post-concert world music.

Following each Fridays@7 concert, the evening continues with more exciting live music. Internationally renowned contemporary percussionist Jamey Haddad invites a diverse selection of artists to collaborate for post-concert music at Severance Hall. Great music to round out your evening and expand your horizons.

The Fridays@7 series is made possible in part through the generous support of the William J. and Dorothy K. E. Nall Foundation.
Alisa Weilerstein is serving as The Cleveland Orchestra's Artist in Residence, a position supported by the Malcolm E. Kassy Artist-in-Residence Fund.

FRIDAYS@7 SERIES TICKETS (five-concert series)
$295 / $190 / $225 / $265 / $310
For info, use seat location, box seat prices, or to place an order, talk to Diane or Monica in the Subscription Office:
— email 3, subscriptions@clelandorchestra.com
— or call them weekdays 9 to 5 at phone number 216-231-1111

October
Oct 9 Friday at 7 p.m.
DOUBLE BEETHOVEN

November
Nov 20 Friday at 7 p.m.
CELLO AND SPACE

January
Jan 8 Friday at 7 p.m.
TRAGEDY TO TRIUMPH

February
Feb 19 Friday at 7 p.m.
MUSICAL OBSESSION

April
Apr 30 Friday at 7 p.m.
ROYAL DRUMS & TRUMPETS
2014-15

Winter Subscription: 60
Celebrity Specials: 7
Christmas Concerts: 3
Fridays @ 7: 4
Summers @ Severance: 10
Nutcracker: 5
Opéra: 2

Total = 91 Concerts
Opera
Ballet
Celebrity.... “At the Movies”
What We’ve found

• The Program is the key...

• 23% NTF

• High Churn

• Added Cost

• Great PR
“FOCUS ON CONCERT GOING EXPERIENCES.... The music is just fine”

• Welcome, Visitor Flow
• Customer Service
• Patron Amenities
• Patron Gap
  • Packaging problems
  • Add more wows
“FOCUS ON CONCERT GOING EXPERIENCES.... The music is just fine”

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