Audience Motivation Research Project

EXECUTIVE SUMMARY

of the Task Force

The American Symphony Orchestra League, on behalf of participating member orchestras, has undertaken the first comprehensive, detailed study of public perspectives about orchestral music and the concert experience in our history. This project seeks to uncover and pinpoint the deepest motivators, inhibitors, and other factors influencing attendance at classical orchestral concerts today. We seek to understand WHY individuals listen to and attend live orchestral concerts.

The Audience Motivation Research Project is designed to produce data and analysis for participating member orchestras that yield practical strategies for addressing the following goals:

- Attract under-represented, under-engaged, and new market segments
- Reduce inhibitors to participation
- Create effective communications and promotional messages
- Influence public perception of orchestras and orchestral music

More than 250 member orchestras have elected to participate in the project and will receive the final report as well as participate in interim presentations and a workshop at the 2001 National Conference in Seattle. The American Express Company has made a generous grant that will allow certain findings to be used on behalf of all American orchestras to achieve the fourth goal – the influence of public perception of orchestras and orchestral music.

The project began with an extensive qualitative phase conducted by SpencerHall, Inc. The purpose of this phase was to discover perceptions of high-, medium-, and low-involved consumers of live orchestral performances. These perceptions were then incorporated in a 21-city quantitative survey (the Survey Questionnaire is included in the Gallup Report) conducted by the Gallup Organization. The quantitative study was to assign significance to the various discoveries from the qualitative phase and analyze the importance of the various findings. A third, post-quantitative analysis phase was conducted by Prescott & Associates to reach a deeper understanding of market segment behavior.

The study was guided by a task force of managers and marketing directors of participating League member orchestras as follows:

Bruce Cauthen, Director of Marketing, Richmond Symphony
Susanna MacLean, Marketing Director, New York Philharmonic
Kenneth Mayer, Marketing Director, Omaha Symphony
Jack McAuliffe, Vice President and Chief Operating Officer, American Symphony Orchestra League
Michele Prisk, Director, Marketing & Sales, San Francisco Symphony
Don Roth, President and Executive Director, Saint Louis Symphony Orchestra
Louise Ruhr, former Vice President, Marketing, The Minnesota Orchestra
David Snead, Vice President, Marketing, Pittsburgh Symphony  
John Sparks, Vice President for Public and Government Affairs, American Symphony Orchestra League  
James Timm, Associate Director of Marketing, New York Philharmonic  
Roland Valliere, Executive Director and CEO, Kansas City Symphony  
Michelle Walter, Executive Director, Richmond Symphony  

Findings of the Project Task Force  

Following is Task Force Executive Summary. The true value of this study is found in the detailed qualitative, quantitative, and post-quantitative reports, available upon request. The deep relationships that exist are best learned by a close study of this material. That said, there are several key findings that help focus your study of the results. Evidence for the findings is referenced to the full research materials. Page numbers beginning with “S” refer to SpencerHall’s qualitative report, with “G” to Gallup’s quantitative report, and with “P” to Prescott’s post-quantitative report.

A—IT’S THE MUSIC, STUPID  

It is the music that draws listeners and audiences. Although the setting, the acoustics, and the presence of others appreciating the music complement the experience, the overwhelming motivation is a connection with the music itself.

Throughout the qualitative focus groups, individuals at all levels of involvement talked about the music itself and factors directly related to the music. They described it as “a profound experience – a virtual meditation in sound,” “there is real power in the personal interpretation of the music,” and “they lose themselves in the music.” (S—11, 15, 25)

This becomes even more apparent in the quantitative analysis. The music is perceived as all-absorbing, good for you, relaxing, refreshing, and expanding. The four most powerful motivational experience descriptions were:

- At classical orchestra concerts, you become completely absorbed in the music. (76%)
- The classical orchestra experience is an educational and continual learning experience. (75%)
- The classical orchestra experience is greatly enhanced if you are familiar with the music. (73%)
- Attending classical orchestra concerts takes you to a special state of mind where you feel relaxed, renewed, and at peace. (73%)

An additional 50% voiced even stronger emotions, describing the concert as “a profound transformational experience that takes you away from the here and now; like meditation or a spiritual experience.” (G—104, 109, 110)

B—THE FREQUENCY SPIRAL
When asked what traits correlate most closely to frequency of attendance, the sole factor is “How much I enjoy the music.” The single significant factor correlating to enjoyment is “How knowledgeable I am about music and how familiar I am with the music.” The single factor correlating to familiarity, is “How frequently I listen or attend.” Almost three-quarters (73%) of the concert attenders believe that “the classical orchestra experience is greatly enhanced if you are familiar with the music”. (G—110)

This not a circular argument, but rather a spiral. As individuals are exposed to classical music, they do become more familiar, which in turn enhances their enjoyment, which in turn stimulates frequent attendance. How do we take advantage of this natural spiral? Is a double subscription of twelve concerts the next step for a six-concert subscriber? Probably not. What do we offer, and how do we encourage them to increase their participation?

C—THERE ARE FEW ABSOLUTE INHIBITORS, JUST TRADE-OFFS

An even more critical question is “what is the point of entry into this participation spiral?” The answer is not in motivations. (By motivators we refer to the thirteen statements of what attenders experience when attending classical orchestra concerts, as identified in the qualitative research and probed in the quantitative survey.) Although some motivators are clearly stronger than others, the importance of the motivators do not vary significantly as a predictor of frequency of attendance. One could conclude that those who attend frequently are motivated by exactly the same factors as those who attend less frequently. Therefore, it is the inhibitors and not motivators that affect frequency of attendance. This is good news, as it is much more difficult to create a motivation to attend than to remove inhibitors to attendance.

Thirteen inhibitors to concert attendance were identified in the focus groups. The quantitative analysis found that only three of them were deemed important by a significant number of the concert attenders: (G—95)

- Difficult to find time in busy schedule (29%)
- Can’t make a commitment ahead of time (22%)
- Tickets Cost too much (20%)

These inhibitors are more than twice as strong for individual ticket buyers than for subscribers, and for those younger than 35 compared to those older than 55. They are even more significant for the culturally aware non-attenders.

For the most part, these inhibitors are not absolute. There are very few potential attenders who cannot afford the cost of a ticket, or who have absolutely no disposable time in their life. What we are hearing is that those who do not attend or attend infrequently do not value classical music higher than other options on which they spend their time and money. It is interesting that the infrequent attender expresses the intention to attend more often than he does. The desire is there, but with family responsibilities and large mortgages, it is difficult for them to make the necessary time and money trade-off. The solution for reducing these inhibitors is creating an
awareness and expectation for classical music that makes attending more attractive than other options.

D—THE ENTERTAINMENT CONTINUUM

Classical orchestra concerts are often categorized as entertainment. The research indicates that entertainment is a continuum, with pure entertainment on one end and enrichment (learning, spirituality, and quality of life) on the other. Activities such as spectator sports, rock concerts, and movies tend towards the entertainment end. Musical theater and orchestral pops come next. Further on we see drama and opera, followed by art galleries, ballet, and dance. Finally, on the other extreme end we see classical orchestra concerts and chamber music. Although there are entertaining aspects to a good concert, we cannot compete as diversionary entertainment. People have as clear need for enrichment activities as for entertainment activities, and the connection to enrichment activities is probably much stronger once it is developed. We must play to our strengths as a powerful enrichment. This approach is supported by the strong feeling of 72% of attenders and 86% of the culturally aware non-attenders that “it is important from time to time to do something for themselves,” “to invest in oneself.”

We could start by identifying an attractive term to capture the attributes of enrichment: that is competitive with the attributes of entertainment. We should also focus energies in long-term category-building initiatives to increase the awareness of what classical music delivers and what enjoyment a familiarity with music brings.

The creation of value expectation will probably vary from market to market. A study of the demographic marketing presented in the Prescott analysis, as well as the customer clusters presented in both the Gallup and Prescott analyses, will provide a basis for developing acquisition strategies.

E—THE GESTATION PERIOD

There is strong evidence in the study that the majority of current attenders developed their initial interest in classical music before the age of fourteen and that three-quarters of them learned to play an instrument as a child. (G—49, 50) At odds with the need to develop an early interest in the music is the age at which individuals enter the orchestra audience. The average age of an attender is 57, and less than 10% of the audience is under 35 years old. This dichotomy provides an extreme challenge for orchestras. They must develop an interest in classical music in pre-teens even though they cannot expect to see them as customers for more than 20 years.

One opportunity to be explored is the family concert. It is clearly an opportunity to reach the pre-teen as well as an opportunity to nurture their parents. Is it sufficient to offer “kiddie concerts” on unattractive dates because we have extra services available? Do we understand the place of family concerts in the presentation array, and have we given them proper planning and preparation? Can we take a lesson from Children’s Television Workshop (Sesame Street) and
include content appealing to both the child and the parents? Is it incumbent on us to work closely with our education, community relations, and artistic staff to build sound, nurturing, cumulative experiences for children and parents alike?

F—CULTURALLY AWARE PROSPECTS

Another important potential market was identified by Prescott Associates: 40% of the culturally aware non-attenders believe they would enjoy classical orchestra concerts. (P—v, 52) It is unlikely that orchestra concerts are currently on this group’s radar screen. They are significantly younger, are less well educated, have more children at home, and have lower incomes. This group perceives classical orchestra concerts to be relaxing and romantic – 80% feeling that it is “important to spend romantic time with a partner.” This could be a strong, deliverable point-of-entry appeal.

G—A MORE DETAILED LOOK AT MOTIVATIONS

The qualitative research identified thirteen motivators. These motivations were stated as concert experiences, and were tested in the quantitative phase to determine the validity and magnitude of these experiences as motivators. (G—98-118)

The strongest motivation is the music itself.
- The classical orchestra experience is an educational and continual learning experience.
- At classical orchestra concerts, you become completely absorbed in the music.
- Attending classical orchestra concerts takes you to a special state of mind where you feel relaxed, renewed, and at peace.
- The classical orchestra experience is greatly enhanced if you are familiar with the music.

There is an interesting dichotomy in these motivators. The concert is both an intensely personal experience (transformational/meditative) and a communal experience (sharing with others as an active participant). A slightly less important set of motivators described the experience itself:
- A classical orchestra concert, like meditation or a spiritual experience, is a profound transformational experience that takes you away from the here and now.
- The classical orchestra experience is a powerful feeling of experiencing and sharing something with others.
- At a classical orchestra concert, the audience is an active participant in the concert.

A moderately strong set of motivators relate to family, even though children are seldom found in frequent attendee households.
- Attending classical orchestra concerts sets a good example for children.
- Classical orchestra performances conjure up fond memories of family and childhood.

The lowest-rated experiences of the identified motivators concerned concerts as social experiences. Even though these social factors score much lower, they are not insignificant, and
one variation on this grouping (the concert as a romantic occasion) does score higher, especially among younger attenders.

- Attending classical orchestra concerts reflects your social status in the community.
- Social factors, such as getting dressed up, having a special evening out, and socializing with friends, are the most exciting part of the classical orchestra experience.
- Attending classical orchestra performances is a fulfillment of your duty to the community and the arts.
- Attending classical orchestra performances is a romantic time with a spouse or partner.

H—RELATIONSHIP OF MOTIVATORS AND FREQUENCY

Although motivators do not significantly affect frequency, younger concert attenders and culturally aware non-attendees do respond to different motivators than older concert attenders. There is little variance in how different age cohorts respond the musical motivators. (G—119-135)

There is very strong, positive agreement across age cohorts on these motivators:

- At classical orchestra concerts, you become completely absorbed in the music.
- The classical orchestra experience is an educational and continual learning experience.
- Attending classical orchestra concerts takes you to a special state of mind where you feel relaxed, renewed, and at peace.
- The classical orchestra experience is greatly enhanced if you are familiar with the music.
- Attending classical orchestra concerts sets a good example for children.

Two motivators are much stronger for young concert attenders than for older ones:

- Attending classical orchestra performances is a romantic time with a spouse or partner.
- Social factors, such as getting dressed up, having a special evening out, and socializing with friends are the most exciting part of the classical orchestra experience.

Two motivators are much weaker for young concert attenders and culturally aware non-attendees:

- Attending classical orchestra performances is a fulfillment of your duty to the community and the arts.
- At a classical orchestra concert, the audience is an active participant in the concert.

It is also interesting to note that culturally aware non-attendees differ from attenders of all ages in that they do not agree with the statement:

- The classical orchestra experience is greatly enhanced if you are familiar with the music.

The strongest motivators of the culturally aware non-attendees correspond directly with the highest motivational experiences of the attenders:

- Classical orchestra concerts are relaxing.
- Going to classical orchestra concerts can be romantic.
At classical orchestra concerts, the audience gets completely absorbed in the music.
You set a good example for children when you go to classical orchestra concerts.

I—THE OTHER INHIBITORS

Although the research showed that “everything matters” about the concert experience, the strongest inhibitors by far are too little time and too little money. The only other significant inhibitor was the lack of awareness of the performance: 13% of attenders simply weren’t aware a concert was happening (25% for those under 35). (G—91-97)

What is just as interesting is what wasn’t an inhibitor:
- Spouse/Partner doesn’t like – 11%
- Too much modern music – 10%
- Too much old, overplayed music – 6%
- Orchestra cares more about them as customers/donors than as audience 6%
- Concerts are too formal – 5%
- Concerts are for individuals of higher status – 5%
- Concerts are for older folks – 5%
- Concerts are intimidating – 4%
- Concerts are for another era – 4%
- I don’t know how to behave and am uncomfortable – 3%

When comparing the impact of inhibitors on subscribers and single-ticket buyers, there are significant variances. Single-ticket buyers (less frequent attenders) were nine times more likely than subscribers (frequent attenders) to say they “couldn’t make a commitment ahead of time,” seven times more likely to say “Tickets cost too much,” five times more likely to claim that it’s “difficult to find time in my busy schedule,” four times more likely to be “unaware of particular performances,” and twice as likely to say “my spouse/partner doesn’t like it.”

Inhibitors show the most extreme variance when younger attenders are compared with older attenders. As a general rule inhibitors are much more significant to younger attenders by the following magnitudes:
10-1 Difficult to find time in busy schedule
10-1 Not aware of particular performances
 8-1 Tickets cost too much
 5-1 Can’t make a commitment ahead of time

Two inhibitors are frequently mentioned by culturally aware non-attenders as compared to attenders:
4-1 Tickets for classical orchestra concerts are expensive.
If you don’t know how to act at classical orchestra concerts, you will feel uncomfortable. There was also some sentiment that they were for older, more wealthy people.

Creating appropriate expectations and providing musical touch points could help remove significant inhibitors for culturally aware non-attenders. Two-thirds of the perceptual differences between attenders and culturally aware non-attenders are explained by two statements about concerts from the culturally aware:

- Uncomfortable if you don’t know how to act at them.
- Have to understand the music to enjoy them.

J—DEMOGRAPHIC DIFFERENCES

One of the most useful analyses is that of behavioral differences of different demographic segments. Prescott Associates has tracked behaviors by commitment level within four dominant demographic Lifestage segments adapted from the A.C. Nielsen lifestyle classification system: (P—ii, Appendix P-I and P-II)

- Older (55+) Singles
- Middle-age (35-54) Childless Couples
- Older Childless Couples
- Middle-age Families

These behaviors and attitudes are tracked across seven Involvement levels:

- Current Subscribers (26%)
- Heavy (5+) Single-ticket Buyers (13%)
- Medium (3-4) Single-ticket Buyers (12%)
- Light (1-2) Single-ticket Buyers (16%)
- Lapsed Single-ticket Buyers (8%)
- Inclined Culturally Aware Non-attenders (10%)
- Disinclined Culturally Aware Non-attenders (15%)

Analysis of differences across involvement levels will provide participating orchestras with fuel for segment identification, packaging, and message development. For example, for younger (18-34) and middle-age (35-54) attenders, those who attend less frequently and the culturally aware who are inclined to attend (think they would enjoy classical orchestra concerts) perceive them as much more romantic than those who attend frequently or subscribe. It is possible that romantic aspects may be a useful acquisition appeal, but less important in retention. Many similar lessons may be learned from a study of the information in these appendices.

K—CONSUMER CLUSTERS

Gallup developed behavioral analysis of consumer clusters. This is a complex analysis of attributes, attitudes, and behaviors that seem to “cluster” together: (G—136-228)
Highly Involved in the Music
- Symphony Dedicated (15%)
- Social Display (21%)
- Romantic Evening Out (20%)
- Music Only (17%)

Lower on Experiences
- Accompanying Someone (16%)
- Experience Little (11%)

Prescott also developed clusters based on inhibitors: (P—37-51)
- No Inhibitors (40%)
- Disengaged (3%)
- Cost Driven (12%)
- Older Critics (18%)
- Entertainment Actives (7%)
- Spouse-Driven (7%)
- Busy Life (16%)

**L—OTHER FINDINGS**

1—Orchestra attenders are most likely found attending other cultural activities. (G—12-15)

Classical orchestra concert attenders attend high arts more frequently than the culturally aware – opera (10.1-1), chamber music (3.5-1), live theater (2.6-1), orchestral pops (2.6-1), and museums/galleries (1.8-1). Classical orchestra concert attenders attend entertainments (movies, sporting events, and rock concerts) less frequently than the culturally aware.

2—Classical orchestra concert tickets are among the most complicated of sales. (G—47)

Attendance is communal. Only 6% of attenders prefer to attend alone (57% with a spouse and 34% with a partner, date, friend, or group). Concert tickets are a thoughtful purchase and seldom impulsive. In almost every case a second person’s interest and schedule must be consulted and a joint decision negotiated.

3—Concert attenders share strong lifestyle traits. (G—59-68)

Attendees are an active lot: 80% enjoy experiences that stimulate the senses. This holds true for the culturally aware as well: 80% seek experiences that challenge them to think and grow. This also holds true for the culturally aware, but is a little less pronounced in attendees older than 55: 65% feel it is important to break routine and get away for an evening (also true for culturally aware, but less so for attendees older than 55). Less than a third prefer familiar music.
to new and less than a quarter describe their life as pretty much the same from week to week. The culturally aware and those older than 55 rate these last two traits somewhat higher.

Attenders nurture themselves and others: 72% feel it is important to do something for themselves from time to time, and 60% feel it is important to spend romantic time with a spouse or partner. Those under 35 and single-performance ticket buyers rate this even higher. Half often contemplate ways to reduce stress. This may be an important appeal to culturally aware non-attenders, as they rate all three of these traits even higher than the attenders.

Attenders are community oriented. More than half think it is important to be part of community activities, and just under half often take part in volunteer work. This is less true for those under 35, single-performance ticket buyers, and the culturally aware.

Attenders are not particularly price sensitive. Fewer than half say that they closely compare prices, and fewer than a third actively look for inexpensive entertainment. These attitudes are much less pronounced in younger attenders and in the culturally aware. Price sensitivity is lowest in those who currently get the largest discounts (subscribers and attenders older than 55). Sensitivity is highest among those under 35 and the culturally aware who frequently get no discount.

4—Demographics of Concert Attenders (G—69-78)

Concert attenders are older. The average concert attender is 57, while the average culturally aware is almost 15 years younger. Subscribers skew older yet, with 75% of them over 55. Only 34% of ticket buyers are over 55, and 23% of the culturally aware are over 55. Only 22% of attenders are under 45, while 53% of the culturally aware are under 45. There is good reason why the audience is older. Everything in the data seems to point to those in the 55+ group as the best prospects for symphony orchestra attendance. They have the time and money not only to attend concerts, but also to prepare for and enjoy them as well. They have also reached a stage in life when self-improvement, continuing education, and enjoying new experiences are very important.

Concert attenders are very well educated: 50% of attenders have postgraduate work or degrees, compared to 19% of the culturally aware. Fewer than 5% have a high school degree or less education.

Most concert attenders do not have children at home. Three-quarters of the concert attenders come from one- and two-person households, and fewer than 30% have any children at home. Just over half of the culturally aware are in one- or two-person households.

Concert attenders earn a substantial income. Concert attender households make twice as much as the average U.S. household at $82,000, and $20,000 more than culturally aware households.

5—Lifestyles of Concert Attenders (G—79-87)
Concert attenders are heavy readers: 80% of concert attenders subscribe to one or more daily newspapers, compared to 58% for culturally aware. Those under 35 look more like culturally aware, with 55% subscribing to a newspaper. Magazine readership tends towards News and Culture titles as opposed to home, food, style, or fashion.

Concert attenders also attend religious services frequently: 72% of concert attenders attend religious services at least once a month with 57% attending three or more times. Concert attenders average 3.46 religious services per month, compared to 3.14 for the culturally aware.

Concert Attenders are heavy travelers: 6% of concert attenders have not taken a pleasure trip in the past twelve months, compared to 11% of culturally aware; 20% have taken ten or more pleasure trips each year. The heavy-travel trait is a plus as an indicator of potential markets, but a negative as it may conflict with a rigid subscription-ticket system, burdening the box office with exchanges or no-shows.

Concert attenders are strong Internet users. For both attenders and culturally aware, half log on “a lot,” and fewer than 30% “never” or “almost never” use the Internet.

Concert attenders prefer live music: 63% of attenders prefer live performances, while 14% prefer CDs or tapes. Among attenders, subscribers have a slightly higher preference for live performances than ticket buyers, and those older than 55 have a higher live-performance preference than those younger than 35. All attenders have a significantly higher live-performance preference than culturally aware, who prefer CDs (46%) over live performances (38%).

6—Important Features of Classical Orchestra Concerts (G—247-256)

Reassuringly, concert attenders believe that the three most important features of a classical orchestra concert are all about the music (on a scale of 1-5):

4.6  How well the music is performed
4.4  The acoustics of the concert hall
4.3  The actual works being performed

Quality of performance and the actual works performed were equally important to all attenders regardless of age. All of the other features are more important to older attenders and subscribers.

The soloist and the conductor are less important, at 3.7 and 3.4 respectively

Creature comforts, including the comfort of the hall and desirability of the seat, were actually more important than the soloist and the conductor at 3.75.