

A Non-Classical Marketing Approach For Classical Music Performing Organizations: An Empirical Perspective

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ABSTRACT

In the last two decades, classical music performing art organizations have been eagerly searching for ways to attract younger audiences and enhance attendance at their live concerts. It seems that their classical marketing approaches are not achieving their goals, and a new and more aggressive approach is in order. The study surveyed a sample of 664 adult individuals in the Inland Empire region of Southern California regarding their attendance patterns to, attitudes towards, and preferences for classical music concerts in general and Riverside County Philharmonic performances in particular. Findings were analyzed and recommendations were made for classical music performing organizations to enhance their marketing strategies and tactics.

Keywords: Classical music marketing, Riverside County Philharmonic, Live concerts marketing, Orchestras marketing, Classical music live concerts promotion.

INTRODUCTION



here's nothing remarkable about it. All one has to do is hit the right keys at the right time and the instrument plays itself." -- *Johann Sebastian Bach*

Why not take a page out of Bach's book --- hit the right keys at the right time for the right audience and the strategy will work by itself. Musicians, orchestra executives, and music lovers are concerned about the future of classical music and live classical music concerts. They see that audiences are old and panic under the assumption that the art will be lost whenever they are gone. Their problem is not that audiences are old; rather, the problem is in preparing younger generations to embrace classical music as entertainment once they get older and their tastes mature. Symphony concerts have typically attracted a more mature audience in the past and will most likely continue to do so. The challenge is determining what changes are required to attract younger audiences, understanding their needs, and being prepared to serve them effectively at the right time. However, the situation of classical music performance organizations could worsen if they do not understand the dynamics of the marketplace and exploit the many options for change in marketing strategies and tactics. For example, the study on American orchestras and classical music by the Knight Foundation demonstrated that there is a large segment of the American population interested in classical music that does not attend concerts. The study concludes that there is much potential for growth in audience (Knight Foundation, 2002).

Most classical music performing organizations recognize that they are in a precarious situation and that there is much room for improvement. A great deal of effort and resources were spent in the last two decades to understand current and potential audiences, their motivations, attendance habits, preferences, and attitudes towards classical music concerts --- a brief overview of such studies will be highlighted later in the literature review.

As mentioned earlier, classical music concerts have always tended to attract a more mature audience. This is partly due to the lifestyle of the individual audience members. Younger audiences are indeed attending, but not as

often as older audiences. Although data show that a higher percentage of older concert-goers subscribe to orchestra concerts, the percentage of younger concert-goers buying single tickets is actually higher than the percentage of older ones doing so. Younger audiences do support classical music performing organizations, but just not as much as the older crowd. The answer may lie in psychologist Carl Jung's analysis. He once said, "Man has two aims in life. The first is the procreation of descendants and the care required for the preservation of his young, involving the acquisition of wealth and social status. When this aim has been satisfied, another phase begins, the goal of which is culture" (Vroon, 1994). Jung points out that in achieving social and economic success people normally leave whole areas of their lives undeveloped. For example, college students, newlyweds, and hot young executives of both sexes are much too busy or tired to relax and enjoy great classical music. A great deal of time and energy is sacrificed to a career and raising a family, and the development and enrichment of one's own personality are often "put on hold." However, once the family is secure and the children have made it through college, it is normal for intelligent people to go back to self-development and enrichment. Thus, culture (art, music and theatre) takes on new importance. Henry Fogel, manager of the Chicago Symphony, once said "that audiences are not getting older at all: they always have been older" (Vroon, 1994).

Despite ample evidence of the importance of the arts in defining the great civilizations of the past, Americans have, on the whole, treated the arts as something of marginal worth. Some view it as a luxury, something reserved for the rich and elite. Others see it as an unnecessary distraction. The symphony orchestra only arrived in the US when European immigrants brought it over with them. Since America lacked a system of nobility and the aristocratic political system of the Europeans, it never developed the need for court musicians and symphony orchestras (Lebrecht, 1997). This is why the tradition of government funding of the orchestra did not develop until recently. Instead, American orchestras had to, and still need to, utilize businesses and wealthy individuals for financial support (Lebrecht, 1997; Hart, 1973). Based on the same argument, average Americans believed that classical music was not for them. It was thought to be only for the finely educated and well-to-do, a notion still prevalent in today's audiences. This perception is an important one to change if classical music performing organizations are to continue to recruit new and engaged audiences.

Rather than blame it on the audiences, the performing art organizations should examine their offerings, marketing strategies and tactics because these also affect the demographics of attendance, the type of audiences, and their level of support. For example, the entrenched subscription marketing system of American orchestras is probably warding off younger audiences that may otherwise be interested in attending live symphony concerts. So, the question is: why classical music performing organizations are in crisis? Is it the high prices? Is it the subscription system? Is it presentation, ambience, highly paid conductors and soloists, or lack of attendance on the part of younger audiences? The survey results demonstrate that the problem and solution lie in both the marketing practices of the organizations and the lifestyle of audiences.

This study was done with a sponsorship from the Riverside County Philharmonic (RCP thereafter) to address the above challenges. Its purpose was to create a better understanding of RCP's current and potential audiences-- demographics, psychographics, preferences, attendance patterns, and media habit; to offer them what they prefer in a live classical music concert, and to effectively communicate to them via well-thought out marketing strategies and tactics. The most important part of this study was a survey of a random sample of 664 adult individuals in the RCP market. Results and analyses will be presented followed by recommendations built in an integrative marketing framework which can be used by RCP or any other interested classical music performing organization.

LITERATURE REVIEW AND CURRENT PRACTICES

This review will focus on the current problems facing the classical music performing organizations and the attempts in theory and practice to eliminate these problems or reduce its adverse effects to enhance the viability and growth of such organizations. The purpose of this review is to learn from previous experiences and practices, and incorporate said knowledge with the results of the market survey conducted by the author to develop an integrative marketing framework which assists classical music organizations in facing current challenges. These challenges revolve around the following: audience majorities are old and not necessarily growing in number; what factors

determine audience attendance to a classical music concert; attempts by different organizations to attract and retain an audience (old and young) and sponsors, and how successful are these attempts; and finally, lessons learned.

One of the major research efforts cited in the literature is the research sponsored by the Knight Foundation (John S. and James L. Knight Foundation, 2002). The Foundation provided grants for research, planning and implementation grants, and related technical assistance to about Fifteen orchestras around the United States (Wolf, 2006). “Magic of Music” is the title of the initiative, and was divided into two distinct phases. Phase 1 was based on the concept of change and that transformations in the concert hall experience would reinvigorate the relationship of orchestras with their audiences thus, in turn, helping reverse the decline in orchestras’ audience base. The central idea was that what happen in the concert hall – the choice and presentation of the music and the way in which musicians (and music director) interact with the audience would be most transformative. Although the initiative included a call for audience education and community outreach, it proved inadequate because more factors need to be considered when the intention is to change audience and potential audience behavior. However, it did contribute greatly to an understanding of the orchestra-audience dynamics (Wolf, 2006). The second phase, the classical music consumer segmentation study, “How Americans Relate to Classical Music and Their Local Orchestras,” is the largest discipline-specific study of arts consumers ever undertaken in the United States (John S. and James L. Knight Foundation, 2002). Strategies adopted by the different orchestras in this study were varied. Some have sought to develop audiences through the production of nontraditional and enhanced concert experiences to attract new audiences/different audiences by providing enjoyable and engaging concert experiences to increase ticket sales, thus building revenues over time; other orchestras sought to develop audiences through relational strategies -- free concerts presented in one or more community locations to introduce the local orchestra to its public, serve as gateway experiences for prospective subscribers, and change common perceptions of the orchestras; still, others have sought to develop audiences through education strategies designed to increase knowledge and understanding of classical music. Survey data from thousands of audiences suggested that current audiences enjoy the classical music concerts presented by their local orchestras, feel connected and committed to their orchestras, and believe that their orchestras are important parts of their communities. However, across the country, orchestra subscription sales to standard classical music series are declining. While single-ticket sales to these series are increasing at some orchestras, these increases are not sufficient to make up for the loss in subscriptions (Whitaker and Philliber, 2003).

In his article “The Search for Shining Eyes”, Wolf summarized the lessons learned from the “Magic of Music” initiative as follows: (Wolf, 2006)

- The problems of orchestras stem not from the music they play but from the delivery systems they employ.
- The mission of an orchestra needs to be clear, focused and achievable.
- Orchestras that are not relevant to their communities are increasingly endangered.
- Transformational change in orchestras is dependent on the joint efforts of all members of the orchestra family – music director, musicians, administration, and volunteer leadership and trustees.
- Free programming and outreach do not turn people into ticket buyers.
- Evidence shows that participatory music programs – including instrumental lessons and choral programs – are correlated with later attendance and ticket buying at orchestral concerts.
- Orchestras need to do more research on those who do not attend their concerts.

Classical music lovers are everywhere, but most of them are not in the local concert halls. Roughly 10% to 15% of American adults have what might be termed a close or moderately close relationship with classical music, and again as many have weaker ties to the art form. The problem is that only half of those who express the very highest levels of preferences for classical music actually attend symphony orchestra concerts (Brown and Bare, 2003).

Conflicting comments about the symphonic audience situation make the actual situation unclear. Ward Gill, Chief Operating Officer of the Minnesota Orchestra states that “they have been saying our audiences are aging for years and years. We have to be aware, but women in their 50s have been the majority of subscription buyers for a long time. That hasn’t changed” (Tillotson, 2002). Andreasen writes that attendance at opera and symphony concerts have been growing at a steady pace since 1970, and that is due to the gradually rising socioeconomic status of the general population, and planned direct and indirect interventions by arts organizations (e.g., creative advertising,

subscription brochures, more accessible ticket booths, more media attention on television, etc.). He also states that the problem of expanding audiences is essentially a marketing problem with five main elements—product, price, promotion, place of offering, and public relations. Marketing directors must understand the process by which the public comes to attend performances (Andreasen, 1991). Peterson, Hull, and Kern (2000) state that the classical music audience is aging faster than the population as a whole; in 1982, those under thirty years of age comprised 26.9% of the audience and by 1997, they comprised just 13.2%; over this same span of years, those over sixty years of age rose from 15.6% to 30.3% of the classical music audience; and by 1997, a higher proportion of the classical music audience was over sixty than was the audience for any other performing art form. They also show much evidence for the life cycle theory. The authors report that by looking at all the art forms together, we find that art attendees in their 20s get quite involved in the art forms of their choice and attend often, while attendees in their 30s and 40s do not go as often, perhaps because of the competing demands of family and work. However, in their later years, attendees come back.

A RAND study also predicts a major restructuring of the American performing arts system along the lines of big organizations versus small organizations. The big organizations would cater to broad markets while the smaller ones would absorb the niche markets. This implies employing diverse marketing techniques for different sized orchestras (RAND, 2002). In another study published by RAND, the authors recommend that orchestras focus on a marketing strategy which heeds more attention to the demand of the audience rather than the supply. Instead of concentrating on aspects such as how to increase the quality of the performance experience, which guest conductors to hire, the friendliness of ushers, and so on, orchestras should instead attempt to learn more about the audience. They must figure out who exactly is attending and why. They must also locate the people who are not in attendance and discover why (McCarthy, Brooks, Lowell, and Zakaras, 2001). In the same study, the authors emphasized the importance of education in predicting whether or not someone will attend a performance in the arts and cited reasonable explanations for this phenomenon. More educated people are also more likely to have taken a course on classical music, perhaps in college. There is also evidence that arts appreciation courses taken in college have an even stronger predictor effect on future attendance than earlier exposure. Philip Hart writes about the importance of early music education and orchestral outreach programs. However, he notes that there have been no factual studies done on the effectiveness of such education programs. Hart recommends liaisons between school administrations and symphony orchestras as a good way of exposing students and children to classical music (Hart, 1973).

Another key issue/complaint from young potential audience cited by some orchestras in the Knight Foundation's research initiative is that of the ambience/atmosphere of the orchestra. With an older population of concert-goers, the ambience is almost guaranteed to be more sedate than a rock concert or musical theater performance. Some people state that orchestra concerts are for "snobs," that it is only for those from the upper classes in fur coats who attend merely to be seen by others. Although it is true that audience members are wealthier and more educated than the average population, it is rare to see people who attend in evening gowns and tuxedos except in some orchestras. At the same time, it is quite common to see concert-goers dressed in blue jeans at small concert halls. An elitist image may have carried over from the past, and that can be mitigated through marketing and branding, along with recruitment of a younger audience.

Summing up, the subscription marketing culture is an important determinant of audience attendance. The majority of American symphony orchestra concerts are sold to subscribers, leaving only a small number of tickets available for single ticket buyers. As a result, marketing strategies are geared towards subscribers. Most of these subscribers are older and wealthier than single ticket buyers. Many are also retired and thus have more free time than the younger segment. Younger people who do attend symphony concerts attend less frequently, and tend to purchase single tickets instead of an entire season's subscription. However, by switching away from a subscription framework, marketing directors are likewise afraid of losing their base audience and the majority of their ticket revenues. This is the main dilemma facing orchestras—should they change their marketing strategy, thereby attracting a younger audience, or keep it as it is, thus retaining the more mature and wealthier audience. This dilemma is very serious and intelligent efforts are required to strike a balance between the two. This is because the subscription culture is so entrenched in the symphony structure, and with today's market, and its development of new technologies, there is an increase in the number of competing leisure activities for younger peoples' times, in addition to activities related to their life cycle—career development, family affairs, etc. The following statement effectively sums up the dilemma facing orchestra marketing directors: Until orchestras begin to change their

dependence on subscriptions, subscription marketing will continue to be the sweet honey that sustains orchestras and a slow-acting poison that impedes their long-term stability (John S. and James L. Knight Foundation, 2002). On a more positive notion, American symphony orchestra is far from dying. With innovative programming and effective marketing different and younger audience members can indeed be recruited.

RIVERSIDE COUNTY PHILHARMONIC: AT A GLANCE

The Riverside County Philharmonic has been producing high quality concerts in Inland Southern California for more than forty nine years. Its mission is to advance the enjoyment and appreciation of symphonic music to the diverse communities of the Inland Southern California region through performances and innovative programs that challenge, educate, enrich, and entertain. RCP's vision is to become one of the leading regional symphony orchestras in America, nationally recognized as a model of artistic excellence, fiscal vitality, and community engagement. This vision of RCP is to be implemented through its core programs and other activities whereby RCP will increasingly become indispensable in the day-to-day lives of its publics. In all of its activities, RCP seeks to deepen its relationships with its constituents through inclusive decision-making, community outreach, recognition, and regular communication. RCP's core programs include: concert season of four orchestral "themed" concerts each year at the Riverside Municipal auditorium targeted for all audiences; a few outreach concerts within a fifty mile radius of Riverside, free to the public; full orchestral concerts for area children which are part of its educational outreach, narrated in Spanish and English; "Heart-Strings" program that offers free admission to area physically and mentally challenged individuals; "Adopt a Musician" program in which the orchestra's Principals visit schools for intensive interaction with students; and annual appearances at the Lake Arrowhead and Lake Elsinore Arts Festivals.

Despite its motivating vision and an impressive portfolio of artistic programs and activities, RCP is struggling, and looking for ways to enhance its financial viability and growth. The majority of its audiences are fifty five years and older. RCP is having a difficulty fully selling out its concerts, is experiencing problems in attracting sponsors and funders to its concerts, and has many more of the characteristic negatives facing similar organizations in the United States. To that effect, and motivated by a positive demographic change in its region, RCP's management initiated and commissioned the author to do a major market survey to learn about its current and potential audiences, their preferences, patterns of attending classical music concerts, their media habits, and more. The goals of such a study is to achieve an accurate in-depth understanding of audiences and market dynamics, allowing RCP to sharpen its mission and vision for the future, tailor its offerings and programs to delight the audiences, develop marketing strategies and tactics, increase participation from the community, and at the same time widen its base of supporters, sponsors and donors for financial viability.

Specifically, the purpose of this market survey is to assess the market of RCP within twenty miles of its location (i.e., Riverside, Corona, San Bernardino, Loma Linda, etc.) regarding current and potential customers' interests and preferences for music type, concert variety and type, attendance frequency; audience demographics and psychographics, and their level of awareness of RCP along with their willingness to support RCP morally and financially. RCP management believes that delighting its audiences is a determinant of its success and is therefore strives to do that effectively.

METHODOLOGY

Data for this study was collected from 664 adults over eighteen years of age from a geographical area within twenty miles of downtown Riverside, the location of the RCP auditorium. Residents were mainly from Riverside, Corona, San Bernardino, and Loma Linda. The respondents were told that the primary purpose of the study was to obtain information about their awareness of, and attitude towards, RCP and classical music concerts in general. The questionnaire attempted to capture respondent patterns of attendance to classical music concerts; preferences as for type of music, soloists, ticket prices, and other activities associated with the concert experience; media habits; and selected demographic and psychographic data. Moreover, specific attitudinal measures were attempted via fifty three Likert-scaled attitude statements. To motivate respondents, they were rewarded with a free ticket to one of RCP's concerts (\$15 value) or a pen (\$8 value).

It is to be noted that the author conducted an extensive literature review, held informational sessions with executives of RCP, and conducted two, in-depth interviews with experts on the classical music industry, two, in-depth interviews with RCP audience members, and two, focus group discussions with individuals of the target market. The purpose of this exploratory research was to uncover issues, influencing factors, and motivations which play a role in the consumer's decision-making regarding the purchase of entertainment services in general, and attending a live concert of classical music in particular. Also, the exploratory research contributed to the development of the survey instrument – a questionnaire made of the structured-type questions.

RCP management is interested in professionals, educated, and well-to-do individuals as a target market because of its assumption that such individuals have the discretionary income necessary to allow them to attend classical music concerts. In this market survey, the researcher considered the target population as all adults residing in the Inland Empire Greater Area (mainly Riverside, Corona, San Bernardino, and Loma Linda) with more emphasis on the affluent communities. A random sample of 664 respondents was selected from the target market. The size of the sample was more than adequate relative to the necessary sample size, calculated at approximately 540 respondents, based on a 95% level of confidence and a 4% margin of error.

Respondents were selected randomly from the target population using cluster random sampling. The area was divided into geographic units (based on a zip code), of which some were randomly selected to be in the sample. Also streets in each zip code were randomly selected. Then, houses were randomly selected from each street (i.e., starting from a certain point in the street and selecting every third house and going back to the starting point). The level of randomness used is adequate to provide a representative sample of the target population. A self-administered structured questionnaire was used to collect the required data. All questions were of the structured type. The final set of questions was refined during and after the exploratory research tasks were completed. All questions and scales used were pre-tested, and the whole questionnaire was subjected to multiple pretests to ensure that it is error-free in form and content.

RESULTS AND ANALYSES

A briefing about the demographics of the respondents is in order. The sample included 664 respondents of whom 381(57.4%) are males and 271(40.8%) are females. 26.9% reported that they have lived in the Inland Empire for more than twenty years, 21.2% have been in the area between eleven to twenty years, and 49.2% have been living in the area for less than ten years. Of the sample, 35.2% are single, 53% are married, and 6.5% are divorced. 49.4% of the sample did not have children living at home while 48.2% do have children living at home. Those who have children under-seven years of age are 17.7%. Those who reported as having children between the ages of seven and twelve are 15.5%, and 15.7% reported as having children between thirteen to eighteen years old. The sample shows that 12.3% had completed high school or had some high school education, 30.6% had some college or completed technical school, 23.6% had a college education and 30.8% had either a graduate or post-graduate education. This is not surprising, given the number of educational institutions within Riverside and surrounding areas, coupled with the relatively young population present in the area. As far as the ethnic composition of the sample, 39.5% is Caucasian, 28.8% is Hispanic/Latino, 13.4% is Asian Pacific islanders, 8.3% is African American, and 6% is made up of other ethnicities, including Native American. The age distribution in the sample is as follows: 66.1% of the sample is between the ages twenty five and fifty four, 13% between the ages of fifty five and seventy four, and 15.8% between the ages of eighteen to twenty four. 4.8% of the sample is comprised of retirees, 22.7% are professionals, 48.8 % hold white collar occupations such as accountants and teachers, and 9% are university students. Blue collar occupations make up 2% of the sample. The most represented fields of work were education (19.9%), medical (19.0%), financial, banking, and other services (11.7%), real estate and retail services (11.6%). The income distribution in the sample was as follows: 34% made \$50,000 or less, 40.7% earned between \$50,000 and \$100,000, and 17.1% earned above \$100,000.

In this presentation and analyses of the result, the focus is on the variables which mainly affect consumer decision-making regarding attendance to classical music concert. 61.4% of the sample play or played a musical instrument, and 37.7% have had formal music education, which indicates familiarity and connectivity with music in general. Of those who have a formal music education, about 74% have had three courses or less, 16.5% have had between four and seven courses, and about 7% have had extensive studies in music. When cross tabulated with

“willingness to volunteer time for classical music performing organizations activities” and “support the organizations by attending their concerts,” those who had music education showed a significantly more favorable attitude than those without music education. However, when it came to financial support, the difference was insignificant. Also, music education was an important factor in reducing the inhibition to attend classical music concerts. When asked about RCP offering courses in music and music appreciation, individuals with music education were more supportive of the idea. About 88.1% of respondents agree or strongly agree that music is essential for child development, and about 85.7% feel that music education should be emphasized in schools. About 70% believe that classical music should be a part of general education. In addition, the 37.7% of the respondents that had formal music education expressed a higher tendency to volunteer time for the activities of local performing art organizations and support them financially. Thus, classical music performing organization should initiate, or continue, if it has already started, offering music education to its current and potential young audiences.

When respondents with formal music education cross tabulated with the response to -- “lack of music knowledge inhibits my attendance to classical music concerts,” there was a significant difference confirming that music education is an important factor to revive attendance to classical music concerts. Overall, 30.9% of the sample agreed (23.6%) and strongly agreed (7.3%) to financially support local performing arts organizations, and about 48.5% agreed and strongly agreed to support by attending the activities and programs of such organizations.

Regarding affiliation of respondents with a musical band or group, 36.6% of the sample is or were members of a musical band or group. Thus, it will be beneficial (as a promotional tool) for classical music performing organizations to connect with bands and musical groups for public relations purposes to help build supportive relationships, awareness, and community spirit. Bands and musical groups could be used as opinion leaders and a major promotional force in selling tickets and increasing memberships. In fact, members of bands or musical group showed a greater willingness than others when it came to volunteering for music performing organizations, attending their concerts, and supporting them financially. As far as how the respondents evaluate themselves as listeners of music, 21.8% of the sample consider themselves as critical listeners of music, 73.5% think of themselves as casual listeners, and 3.3% are uninterested. Regarding their level of knowledge of music, 16.1% consider themselves as not knowledgeable, 69.3% are somewhat knowledgeable, and 13.9% consider themselves as knowledgeable. However, when asked about the probability of attending classical music concerts or recitals, 12.8% indicated a very low likelihood (10% or less) of doing so while 14% indicated between a 10% and 50% likelihood of attending, and 26.2% indicated a probability of 50% or more.

The genres of music that the respondents listened to varies from rock (20.8%), classical (16.6%), easy (14.5%), jazz (9.5%), gospel (8.4%), R&B (8%); 18.2% mentioned other types including country, hip-hop, and Spanish. It is encouraging to see that 16.6% of the market listens to classical music. For practical purposes, identifying the demographic profile of these customers (who reported higher probability of attending and listening) will help the organization determine its potential audience and develop appropriate strategies to attract them to its audience base.

When asked about the probability of attending the opera, ballet or other dance performances, classical music concerts, the theater, museums, and art opening events, about 53.1% of the population were willing to attend classical music concerts or recitals with various probabilities below 75%. Only 15.2% were willing to attend with a probability of 75% -100%. However, it is encouraging to find that a majority of the respondents have been attending classical music concerts for some time. For example, 23.1% of the sample reported attending classical music concerts for more than eight years, and 21.9% reported attendance for two-eight years. 89.9% of the sample have attended a music concert, and 61.1% attended a music concert in the last twelve months. These encouraging results indicate that people are involved in attending live music concerts. When asked about the type of the music played at the most recent concert they attended, 26.2% of the respondents said Classical/Chamber music. Interestingly, the large majority of the 26.2% were in age categories varied from twenty five to fifty four years of age. As far as the frequency of attendance goes for those who reported attending, 52.6% reported that they attend once per year, 21.5% twice per year, 8.2% reported three times per year, and 17.7% reported four times or more per year. These results indicate the existence of a potential market in the area under study.

When asked to rate their support for cultural organizations and their events, 6.3% were not interested in any kind of support, 40% rate their support from 1-5 on a scale of 1-10, and 37.2% rate their support from 6-8. Most importantly, 16.4% are willing to support almost fully, and rate their support as 9-10 on a scale of 1-10. It is also important to note that younger individuals (age twenty four to fifty four) showed a significantly greater adherence to the belief that performing art organizations enhances the cultural image of the community than older respondents.

The following question asked with whom a respondent attended music concerts. 5.8% went alone, 28.5% went with their spouse, 19.1% went with other family members, 30.8% went with a friend, and the remaining 15% went either with a date (7.8%), social group, work colleague, or others. The fact that the large majority of people were accompanied by somebody else can be used to promote the socialization value of attending a music concert. Also, a promotion to treat a friend or your spouse to a special concert event is an interested idea. This should also encourage classical music performing organizations to promote group tickets, and present the concert experience as a great way for the group to enjoy quality time together. Special discounts could be offered as well.

When asked how far the location of a concert they recently attended was from their residence, 23.9% reported less than ten miles, 14.1% said ten to twenty miles, 26% reported twenty to forty miles, and 35.9% reported over forty miles. However, distance driven to attend a concert by non-classical music concerts goes longer. This information indicates that people are willing to drive a good distance to see what they want.

Respondents were also asked about the type of tickets they had to concerts they attended in the last two years. 56.3% of the sample reported that they used single ticket, and 19.7% get the tickets for free. Only 3.8% were subscription based, 7.4% got group tickets, and 3.2% got a discount ticket. This indicates that most people prefer single ticket purchases. Although classical music performing organizations would love to sell seasonal packages, management should not ignore single ticket buyers, and attempt to find a way to promote to them without harming its subscription base.

As far where they purchased concert tickets, 31.7% reported the box office, 30.9% said on the Internet, 28.9% said a ticket was given to them, and 8.6% reported telephone or mail order. This information has certain implications for marketing strategy – audience must have accessible online ticket purchasing, and they should be encouraged to purchase tickets as gifts for others. A ticket to a classical concert is something that many would not buy for themselves but would appreciate as a gift due to its value and cultural meaning. When asked about the probability of gifting someone RCP concert ticket(s), 26% reported a probability of 50% to 100%.

Regarding the ticket price paid for the last concert they attended. 20.9% paid \$15 or less, 16.4% paid \$16-\$25, 26.2% paid \$26-\$50, 17.5% paid \$51-\$75, 11.1% paid \$76-\$100, and 7.8% paid more than \$100 per ticket. When asked what is the maximum ticket price you would pay for a music concert, respondents reported the following: 4.3% of the respondents were willing to pay \$20 or less, 14.5% were willing to pay \$20-\$40, 25.8% were willing to pay \$40-\$60, 8.4% were willing to pay \$60-\$80, 24.2% were willing to pay \$80-\$100 per ticket, 10.1% were willing to pay \$100-\$150, and 12.5% were willing to pay over \$150, of whom many mentioned \$200-\$400. These numbers are very encouraging and demonstrate people's willingness to pay for what they want and what interests them.

Respondents reported their preference for ticket packages as follows: 46.1% preferred single ticket purchase, 38.3% stated a preference for a two-ticket package, 3.9% preferred a three-ticket package, and 11.6% would like a four-tickets or a seasonal package. This result calls for a more flexible selling approach - as an alternative to the subscription selling system – which includes one-ticket, two-ticket, and four-ticket packages, providing consumers with flexibility in buying concert tickets. Providing these options will not contradict or reduce emphasis on finding and keeping subscribers and friends for life. It is just a matter of selling audience tickets in the package format they prefer.

Regarding what factors are influencing respondents' decisions to drive a greater distance for a concert, it seemed that people were either interested in the band/group performing the music or in the genre of music. 46.1% reported the style of music as a deciding factor, while 44% reported the band/group as a deciding factor. The featured soloist was also reported by 30.4% as a deciding factor. A thorough analysis of these results should

provide some directives as to what to offer to attract customers. Classical music performing organizations need branding and positioning strategy, and cater to the taste of its audience as for type of music and/or featured soloist.

Respondents were also asked about the factors that would lead them to pay more for a concert. The results were very similar to the factors that would lead them to drive a great distance. The band/group, the style of music, and the soloist have the highest percentages as deciding factors. Then when asked how much more they are willing to pay for a world-renowned artist, 60.6% were willing to pay between 20%-30% above ticket price, 19.6% were willing to pay 50% more, 11.1% were willing to pay 100% more, and 6.1% were willing to pay 200% or more above the ticket price. Such information will aid an organization in deciding how to price a ticket should they invite a world renowned artist to play at a concert.

When asked about the three most important factors that inhibit you from attending classical music concerts, respondents reported the following: Driving distance and ticket prices were mentioned by 22.5% and 20.7% respectively of the respondents followed by lack of time, quality performance, and unfamiliarity with programs. Urban location of concert, finding a baby sitter, parking, and advance planning were not mentioned but by a small percentage of the sample. Organizations should work to better inform their local target market about their creative programs, thereby increasing awareness on the availability of classical music concerts not far from home.

The respondents were given several factors and were asked to rate each one according to its importance as a contributor to the success of a classical music concert on a scale from (1) unimportant to (7) very important. Multiple factors scored high on the scale (e.g., Quality of Orchestra, Musicians, Music Selection, Quality of Venue, Acoustics, and Quality of Performance experience). Other factors were somewhat important. Conductor's nationality and multi-ethnic programming scored the lowest of the factors on the importance scale.

When asked if they have heard of Riverside County Philharmonic (RCP), 52.1% of respondents reported that they were not aware of RCP. In such a case, RCP should definitely design a program geared towards creating awareness throughout the market of its name, programs, offerings, and role in the community. Those respondents who have heard of RCP, they heard about it via word-of-mouth 33.1%, newspaper 16.4%, flyer/ brochure 6.9%, community organization or meeting 5.5%, radio 5.3%, and the rest heard from TV, the Internet, direct mail, posters, etc. But when asked respondents where they normally obtained concert/entertainment information, word-of-mouth and Internet scored the highest (mentioned by 46.7% and 43.3% of the respondents) as sources of entertainment information, followed by radio and newspaper (mentioned by 24.2% and 22.2% respectively), and then TV and flyer/brochures. This is a very important measure to consider when deciding on what methods will best reach the target market. According to these results, networking and creating association with current and potential audience are essential. Every subscriber and member of an organization should be a salesperson and promoter of the organization and its program.

When asked if they were a subscriber to any performing arts organization, only 4.4 were subscribers. As follow-up, nonsubscribers were asked about the probability of subscribing in the near future, 16.0% mentioned a probability of 40%-100%. Nonsubscribers were then asked, what was the most important factor for not subscribing? 24.1% said they were not interested, 15.8% said lack of time, 13.1% said money and price of ticket, 11.3% said unfamiliarity and lack of information, and 5.7 reported other excuses.

Respondents were asked which services they would like RCP to offer, and were given several choices. The results were intended to help RCP tailor its programs and activities as per the interests of its target audience. Church concerts, pre-concert lecture, program notes sent in advance, theme-oriented concerts, video enhancement, musicians and audience interaction, post concert questions and answers, music education classes, description/commentary from the stage, and after-concert parties were all mentioned by several respondents. However, the answers mentioned most were concerts in the park, family concerts, programs for young people, concerts at high schools/universities, and integration of drama, dance, and visual arts.

In one of the questions, respondents were asked if they would buy tickets to other concerts if RCP gave them a free concert ticket, and 65.4% said yes. This positive response should encourage RCP to use free ticket offers in developing a promotion strategy. Respondents were further asked what they would like to see included if RCP

were to offer an entertainment package. Pre-concert receptions, post-concert dinners with the artists, post-concert wine and cheese with the performers or casual conversations with them were mentioned by about 30% of the respondents. Pre-concert lecture and Q&A sessions were mentioned by only 14% of respondents.

Summing up, the results were encouraging. There is a potential market for classical music performing organizations to tune in. However, they must learn about audience preferences, and what influence their attendance behavior, to be able to develop effective marketing strategies and tactics.

RECOMMENDATIONS AND CONCLUSION

The results of the market survey were very enlightening and can provide motivating guidance to all classical music performing organizations. The author intends in this section of the paper to present the recommendations within integrative marketing framework whereby an organization determines its target market, understands its dynamics, and nourishes its growth. This strategy must be pursued with a clear vision and mission. The organization must foster a value proposition that is firmly engrained in its culture, highly valued by its customers, and clearly perceived by its audience members (current and potential), thus, creating a favorable image in their hearts and minds. Moreover, the recommendations are geared to assist such organizations to develop effective strategies, and marketing program and tactics to achieve their objectives. The key to this is a continuous interaction and communication with the base to build positive and delightful long-term relationships, effective response to their motivations and needs, and partner with them for success.

Know your target audience via data base and interactive marketing: Results reveal that the market is ready. People love music in general, and they demonstrate an appreciation for classical music in particular, as well as a willingness to learn more about it. A classical music performing organization can count, conservatively, on 15% of its local market population for attendance and support. This assumption is based on the finding that 16.7% of the respondents listen to classical/chamber music most of the time. In addition to this, 15.2% of the sample expressed a probabilistic intention of 75%-100% for attending classical music concerts, while another 18.7% expressed a 25%-75% probability of attending. As further support for the above assumption, 16.4% of the respondents reported their rate of support of cultural organizations and events as 9-10 on a scale of 1 to 10, and 37.2% rated their support as 6-10 on the same scale. 47.2% of the respondents have attended a music concert in last twelve months, and another 15.7% have attended a music concert in the last one to three years. 26.2% of all respondents have attended music concerts at which classical music was played.

Results of the survey indicate that it is more effective for classical music performing organizations to maintain their current market, and gear some efforts towards attracting and developing a younger (35-55 years) and educated audience with an annual income of \$60,000 or above. New efforts to address female audiences are also necessary. The underlying philosophy of classical music performing organizations ought to be that a customer is a customer for life. The focus should be on building a community around the organization, building long-term relationships, and encouraging audience participation and a sense of pride in being part of and a supporter of such organization. Classical music performing organizations should also work to develop alliances with corporations, educational institutions, artists, performing art organizations, and non-profit organizations in their local area. Organizations must utilize their board members as well as satisfied and delighted audience members as an indirect sales force and as promoters through their social networks.

Target the educated: Educated people are more willing to volunteer time, and have a tendency to support performing arts organizations. They rate themselves higher than others (on a scale of 1-10) regarding support of cultural organizations; they report a higher probability of attending classical music concerts/events, and they attended more musical concerts where classical music is played.

Emphasize reaching out to female audience members: Females have a slightly higher probability of attending classical music concerts than males and also reported a higher frequency of attending classical music concerts. Females tend to have a higher rate of support for cultural organizations, and more than males, show their support by attending the programs of performing art organizations. Females adhere more strongly than males to the belief that cultural organizations are an integral part of the community.

What Age Group Should Be Targeted? Age per se is not a significant determinant of orchestra attendance. Factors such as income, education level, race, and gender are better predictors of orchestra attendance than age. Several inhibitions to concert attendance exist for younger people. These include money, time, and the availability of tickets. Young people subscribe significantly less than older people do, while attending concerts more frequently with single tickets. This is due to the lack of flexibility of subscription packages, the need to plan ahead, the higher expense, and the greater time commitment of multiple concerts. The life cycle theory also suggests that younger people are often in the busiest period of the life cycle, attempting to balance both career and family responsibilities. This should assure classical music performing organizations their audiences are not really graying and they are not dying away with their older audiences. However, if they are interested in serving younger audiences to widen their audience base, they will have to make some changes, especially by introducing some flexibility in subscription packages.

Develop an effective image and brand favorable to your community: A classical music performing organization should position itself in the mind of the local public as a cultural organization which offers excellent programming in classical music as well as other activities which bring people together and enhance the cultural image of the community as a whole. Some positioning statements to fulfill this vision are: “the heart and face of the community”, “quality concerts at your doorsteps”, and “artistic performances that make you proud”. According to this market survey, 66.6% of respondents strongly believe that RCP enhances the cultural image of the community. In addition, we found that 66.3% agree and strongly agree that RCP provides a valuable service to the community. A name and an image of an orchestra that carry favorable associations have a major impact not only on the audience, but on the community as a whole, and helping to attract media attention. In turn, media attention and a favorable organization image/brand are important elements of orchestra audience development. According to a study done by the National Arts Journalism Program, classical music is competing for attention in the media not only with other music forms, but with the other high arts, as well as mass culture and lifestyle. However, the study also found that the non-profit high arts are able to compete effectively with well-funded mass culture (Janeway, Levy, Szanto, and Tyndall, 1999).

Media attention is important not only for publicity in the news and advertising of concerts and events, but also for changing the brand image of the orchestra. For some, orchestras and classical music still evoke an image of snobbery. Branding orchestras differently can help alter this image and can target different audience groups (mainly younger audiences).

In general, several issues contribute to the brand image of an orchestra—nationality of the conductors, crossover programming, and the size and wealth of the orchestra. It is to be noted here that the nationality of the conductor was not a significant factor to the audience in this study. Crossover concerts also help brand orchestras differently and bring in audience members who enjoy other art forms, but they are generally more effective in smaller organizations. Finally, the size of an orchestra should determine how it brands itself. Large, prestigious groups market themselves as such and base their brand image on their capacity to feature world-renowned star soloists and guest conductors. Smaller size organizations, on the other hand, brand themselves based on crossover and innovative programming.

Therefore, a classical music performing organization should work towards establishing a brand name and a favorable image in the minds of its local community. This will enhance its viability, develop its audience, win audience members as promoters in their community, and attract sponsors and donors. A fresh approach to branding can help classical music get rid of its elitist image, attract younger people, and interest potential audience members to learn more about the art form and attend concerts.

Match your offerings, programs, and activities to your audience expectations and interests: Younger people and potential audiences in general are more interested in contemporary music. More potential audience members than current single ticket buyers and subscribers stated they would attend the symphony more if additional contemporary works were featured. The age of respondents was also a significant factor when respondents were asked “I will attend more if more modern pieces were played.” Age group eighteen to fifty four years of age reported higher levels of agreement with the statement. This may show that programming more new works may help bring in these prospective concert-goers.

When asked about the factors that influence respondents to drive a greater distance and pay more for a concert, the group/band/ensemble, the style of music, the soloist, the venue and its location, and positive reviews from friends were the most popular answers. Other variables were considered of second tier of importance. Thus, any improvement along the former mentioned dimensions may help attendance.

The willingness on the part of respondents to pay more for a concert of a world renowned artist was somewhat encouraging. 6.1% were willing to pay 200% and more, 11.1% were willing to pay 100% more, 19.6% were willing to pay 50% more. Moreover, respondents were asked to rate the importance of certain factors (on a scale of 1 to 7) as contributors to the success of a concert, Quality of Orchestra, Quality of Venue, Musicians, Musical Selection, Acoustics, and Quality of Performance Experience scored higher on average, while Conductor's Nationality and Multi-ethnic Programming scored lowest. Considerations should be given in programming to these important factors as they are perceived important by potential audience members.

When asked about the services they would like RCP to offer, the most popular responses were concerts in community parks (47.4%), concerts in high schools/universities (43.5%), family concerts (39.8%), and church concerts (36.3%). On the other hand, a small percentage mentioned from stage commentary (9.5%), pre-concert lectures (8.9%), and post-concert question and answer sessions (7.4%).

Regarding classical music performing organizations' music educational efforts, listening perception courses and general classical music courses should be offered. If the organization was not able to offer such courses as a promotion, free of charge, the cost should not be high, as this might ward off some who are interested but not willing to pay a significant amount. Many concert-goers and potential audience members say that they would be "somewhat interested" or "very interested" in learning more about the music.

In short, according to the market survey results, musicians, quality of orchestra, style of music, music selection, soloist, venue and acoustics are important factors to consider when developing programs. Bringing in world-renowned artist, especially for a small orchestra, would create some excitement in the marketplace and the community. Organizations should offer music education programs, because lack of music education tends to inhibit attendance; respondents with music education are more appreciative of quality performances. Finally, nontraditional concert formats and performances that link classical music to other art forms are effective ways to expand and diversify audiences, energize the concert experience, and increase ticket revenues over time.

How about attendance ticket prices? Price was not a major inhibiting factor across most demographic categories of the sample. However, there is a misperception of ticket prices as extremely expensive. Therefore, classical music performing organizations should eliminate this perception by publishing their prices clearly to their target markets. The subscription system of selling tickets is definitely inhibiting the younger potential audience. When asked about the type of ticket they used to go to the concert they most recently attended, 56.3% of the respondents reported buying a single ticket and 19.7% got the ticket free. Only 3.8% got their ticket as part of a subscription, 7.4% got group tickets, and 3.2% got a discount ticket. This indicates that people prefer single-ticket purchases which is highly correlated with their preference for ticket packages, whereby 46.1% expressed interest in buying single tickets, 38.3% prefer two-ticket package and 11.8% prefer four-ticket/seasonal packages. When respondents were asked about the probability of subscribing in the near future, about 5% reported a probability of 70%-100%. Single tickets should be gradually increased, not necessarily to replace subscription tickets, but to offer an option that will broaden the audience base and attract younger people. Each organization will have a different means of doing this as each has different financial and structural concerns. There are many benefits to the subscription system. It brings in the majority of the money that orchestras make from ticket sales, money that comes in "at the front end" and can be invested. Subscriptions are also cheaper and easier to market than single tickets. However, subscriptions mainly attract an older and wealthier audience. They also tend to discourage younger people from attending due to the lack of flexibility, time, and money. Younger people who would like to hear a symphony concert are much more likely to purchase a single ticket than an older person. Research has shown that most potential audience members have no interest in subscribing to concerts, so basing a marketing approach on subscriptions will do nothing to attract these people. While single tickets do bring in less money than subscriptions and are more difficult to market, single ticket buyer may convert to subscribers at a later stage of their life cycle. In summary, classical music performance organizations should keep the subscription system and highlight subscribers' benefits while also offering flexible

options via single ticket packages with rewards for frequency of purchases and early purchasing that will lure audience into the subscription model.

The venue and where to buy attendance tickets: The venue of the concert and the location of the venue were of some importance to the respondents, but not a determinant factor. As far as the place of purchase of concert tickets goes, 31.7% of the respondents bought their tickets from a box office, 30.9% bought tickets on-line (via the Internet), and 28.9% reported that the ticket was given to them. Only 6.9% purchased their ticket via telephone, and 1.7% by mail order. This implies classical music performing organization should arrange for a ticket-selling website to facilitate its on-line sales, and possibly for receiving donations. Organizations can also strategically ally themselves with other organizations to promote their concerts and eventually have a wider base of audiences/customers for both organizations.

Communicate effectively to current and potential audience: If finances allow, classical music performing organizations need to have more bold advertisements in the media, whether in newspapers, magazines, or new technologies. Orchestras must also have a stronger presence in the local media to create awareness and establish its image in the community. However, the survey did show that word-of-mouth and the Internet were the best sources of entertainment information. 51.4% of the respondents reported having heard of RCP. When asked how did they heard about RCP, 33.1% reported that they heard about it via word-of-mouth, 16.4% heard about it from the newspaper, and the rest reported that they heard about it from various sources distributed over TV, Internet, direct mail, radio, poster, and flyer/brochure. However, when asked about their normal source of entertainment information, 46.7% mentioned word-of-mouth, 43.3% mentioned the Internet, 24.2% reported radio, 22.2% reported newspaper, 17.9% mentioned TV, and 16.3% mentioned flyers/brochures (It is important to note that the percentages add up to more than 100% because respondents were allowed to check more than one source). This information should be helpful to classical music performing organizations and their marketing team when deciding where to spend their advertising dollar.

Based on this study, classical music performing organization should create full market awareness of their programs and activities, utilize educational programs and community concerts to connect with their market, induce attendance for potential audience through free tickets or heavily discounted ones, encouraging people to attend future concerts, and promote group attendance with the idea of treating a friend, spouse, or family to a concert. Organizations should also promote beyond their local area, since people are willing to drive to concerts. 35.9% of the sample reported that they drove more than forty miles to attend their most recent concert. Word of mouth and networking should be primary strategies in promoting concerts because “reviews from friends” was an important factor for attendance.

Finally, classical music performing organizations should develop a database for their audience to keep them in tune with audience attendance patterns, changes in their preferences, trends, and any unmet needs they might have. This is crucial for the development of the long-term relationships which will keep an audience loyal for life. There is great potential for growth, especially with the baby boomers are well fit in the traditional market segment for classical music. However, there are steps which must be taken to ensure this growth. Classical music is as alive as ever; its only requirement is a constantly renewable audience.

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